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GCC Group Special Edition

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Kip Hanson

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GCC Group is a U.K.-based Microsoft Gold Partner established in 1992. GCC has a goal to go beyond technology to create new capabilities and better business outcomes for our clients. They provide IT consultancy, solutions, services, and support to small- and medium-sized businesses, from operational hubs in London and Gloucester and regional offices in Bristol and Birmingham.

GCC Group is a cloud-focused business that implements solutions including Microsoft Azure, Microsoft Office 365, and Microsoft Dynamics 365 applications. They have extensive experience and expertise in the design, implementation, and support of these services having delivered thousands of licenses to companies throughout the U.K.

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Microsoft[®] Dynamics 365[®]

GCC Group Special Edition

by Kip Hanson

**for
dummies[®]**
A Wiley Brand

Microsoft® Dynamics 365® For Dummies®, GCC Group Special Edition

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Introduction

A little over half a century ago, an engineer at IBM developed a computer algorithm with the awesome ability to determine raw material requirements for the factory floor. His name was Joseph Orlicky, and he called his new brainchild MRP, which is short for Material Requirements Planning. Aside from inventing one of the first software acronyms, Orlicky had inadvertently pushed manufacturers, distributors, and any business with a schedule to keep, into the computer age. Unfortunately, computers were as large as refrigerators back then and far more expensive, and MRP was slow to gain ground.

Fast-forward 20 years. Oliver Wight (his friends called him Ollie) took Orlicky's vision one step further, expanding MRP's capabilities to include sales and operations, master scheduling, capacity planning, and other important tools. Traditional ERP software is now being rapidly upstaged by the next generation of cloud computing. This new approach means that the siloed, complicated, and outdated Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM) systems of yesterday have been replaced with a far more robust and flexible solution. What was rigid and disconnected is now a set of intelligent cloud services that allows any business to start small with just what it needs, scale on demand as its needs grow, and add additional solutions as its needs change.

About This Book

This book is about a modern suite of business applications called Microsoft Dynamics 365. Compared to what was available even a few short years ago, never mind during the heady days of Orlicky and Wight, it's some whiz-bang software. Need to look up a sales order on your smartphone? Schedule a delivery or order product while checking email? Easily share information with everyone in the company? Microsoft Dynamics 365 can do this and more.

Foolish Assumptions

Aside from the ability to decipher acronyms, this book assumes you know what a computer is and that some of them use old ERP software. Pretty easy, huh? Of course, you should probably be looking at actually moving away from a traditional ERP system, or considering an upgrade to your current Microsoft Dynamics (or related) software.

Icons Used in This Book

A handful of helpful icons exists throughout this book. Pay attention to these golden nuggets of information. Feel free to copy them down on sticky notes and stick them on the walls of your cubicle, the breakroom, and even the loo. Your boss will surely recognise your value to the company and give you a nice raise.



TIP

Tips are helpful hints you can use to make the road to a successful ERP implementation a little less bumpy. Share enough of them with your friends and word will soon get out that you're a Jedi knight of ERP systems — knowledgeable and good to have around.



REMEMBER

If you can barely remember your mother's birthday, how are you expected to remember a bunch of ERP techno-babble? Thankfully, the Remember icon will help you keep track of important ERP concepts.



WARNING

Anyone who reads the business news has heard horror stories of failed ERP implementations. If only those companies had read the Warning icons along the way, they might have realised a better outcome.



TECHNICAL
STUFF

The IT world is filled with boring technical jargon. Unless you're really into that kind of thing, or want to impress your friends with your understanding of terms like *bandwidth*, *HTTP*, and *default gateway*, you can probably skip the technical stuff icons. Maybe.

Now, let's dive in and get started!

- » Do we really need a new system?
- » Taking stock of key performance indicators
- » Becoming cloud-savvy
- » Looking at Dynamics 365 under the hood

Chapter 1

Announcing Microsoft Dynamics 365

Microsoft, the company that brought Windows, Excel, and other important office tools to business users everywhere, has scored yet again with its new set of intelligent cloud services – Dynamics 365, which is powered by another global game changer, Microsoft Azure.

In companies across the world, Dynamics 365 is replacing the complicated and outdated Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM) systems of the past, and turning what was rigid and disconnected into a set of intelligent cloud services.

Investment in a new software system might seem like a scary proposition, especially to those companies in the small to medium business (SMB) space that don't have a fleet of IT experts on staff. Is it really necessary? After all, the current system, be it a spreadsheet, a low-cost accounting package, or a tired version of QuickBooks, Sage 50 or Sage 200 is still quite capable of taking sales orders and paying the bills. Why bother with the hassle and expense of an upgrade?

Are You Sure About This?

It turns out there are some very good reasons to consider this new breed of business software. The IT world, and especially software, has undergone some dramatic improvements over the past few years, largely because of an exciting new technology known as the ‘cloud’ (more on this later). Cloud-based software provides businesses small and large alike greater visibility of their processes, more opportunities to collaborate on a company-wide basis, and simplified management of data and IT functions.

Best of all, these new tools are not only easier to use, but also require less effort to implement and far less investment now and in the future. They’re also fully integrated – no more silos of information – and can scale on demand to your growing business needs (check out Figure 1-1). Maybe it’s time to roll up your sleeves and take a close look at all that’s available. Your bottom line will thank you.



FIGURE 1-1: Microsoft has brought the best of all worlds to business users, and then placed it in the cloud.

Key indicators

Before beginning any improvement project, it's a good idea to take stock of where you are right now. This allows you not only to know where you're going and what areas you should focus on, but also provides benchmarks against which to measure your company's success. And when you're all done, you'll be able to look back and see how far you've come, smile, and give yourself a well-deserved pat on the back.

Here are a few examples of key performance indicators (KPIs) used by many companies:

- » **Working capital:** Business owners and accountants probably have a good idea how much cash is in the bank, or the value of their accounts receivable, but does anyone track it, to identify trends or actively try to improve it?
- » **Sales pipeline:** How much is in your sales pipeline, what's the likelihood of winning potential sales leads, what are the quote success ratios for the past quarter, and the efficacy of your company's marketing efforts?
- » **Service level:** Customers who call with a question or problem might soon be ex-customers if they hang up the phone unhappy. Monitoring service levels of your customer service team or help desk is a good way to make sure your clients stick around for a long time.

There are dozens more, but this book isn't about performance metrics; it's about the software needed to improve them. So if you're not currently tracking these and other KPIs due to old-fashioned ERP and CRM software limitations, it's time to find a new system. If you're tracking them but spending way too much time doing so, it's time to find a new system. If you're tracking them and there's no room for improvement, feel free to put down this book and go home early. If not, you'd best keep reading.

What can we expect from intelligent cloud services?

This is a simple question with a complex answer. Historically, CRM and ERP implementations have been complex affairs, consuming huge amounts of resources and taking months or years to complete. The good news is this: that time-worn and wasteful implementation paradigm is beginning to shift as cloud-based

systems become mainstream. Cloud systems are much easier to get off the ground than traditional systems. They offer faster pay-back and require less work to maintain. So the short answer is this: forget what you've heard or what you may already know, and take a fresh look at Dynamics 365. It's all changed.

The Future of ERP Is Here Now

The term ERP was coined during the early 1990s, not even 30 years ago. Isn't it amazing then how important CRM and ERP software has become to businesses the world over, and how much it has evolved since that Cold War era? From clumsy command-line interfaces to user-friendly, graphics-rich environments, cloud applications have become easier to use while offering increasingly capable functionality. Microsoft Dynamics 365 eliminates the silos of information common in those companies still relying on traditional business software, allowing them to start with only what they need and scale upwards as their needs change.

Microsoft Dynamics 365 also lets us use Outlook or a smartphone to check on a production order, automatically generate an email to inquire about a shipment, request supplies via text message, or login to the company's social media account to check on the success of recent marketing activities (see Figure 1-2). And there's lots more to come.

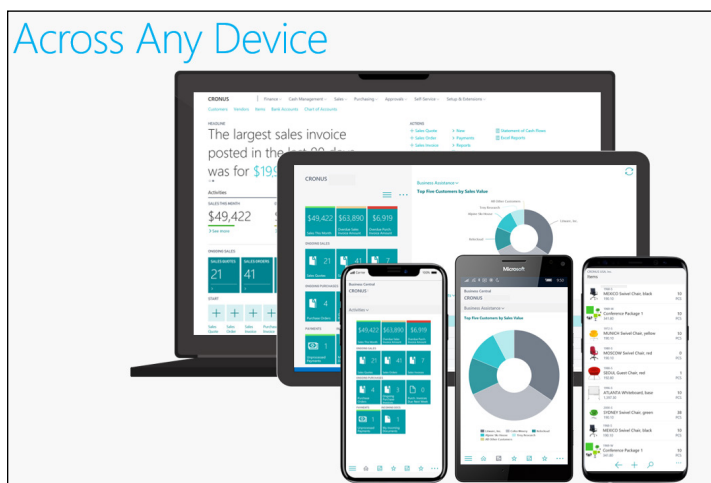


FIGURE 1-2: Dynamics 365 works seamlessly across all your devices.

A Dynamics 365 History Lesson

One of the pioneers in this area has long been Microsoft, which jumped feet first into the ERP space in 2000. Initially designed for accounting and finance management, Microsoft Dynamics has since evolved into a full-featured business management system, developed from several historic business software packages including:

- » **Dynamics AX:** Developed as a collaboration between Danish company Damgaard and IBM, it was released in 1998 as IBM Axapta. AX became part of the Microsoft family in 2002 and has been a popular ERP solution ever since among medium to large enterprise companies.
- » **Dynamics NAV:** Originally known simply as NAVISION, it too was once owned by a Danish company, in this case PC&C. In 2002, it was acquired and became the primary offering of the newly formed Microsoft Business Solutions. It began life as a suite of accounting tools, but has since evolved into a complete ERP solution.
- » **Dynamics CRM:** Recognising the need for a CRM tool, Microsoft developed and released CRM1.0 in early 2003. It underwent numerous revisions over the next decade, and was rebranded under the Dynamics name along the way. Today it's been redesigned to work within the cloud and is known as Dynamics 365 for Sales, an important part of the Dynamics 365 suite of products.

Thanks to Microsoft, Dynamics 365 users no longer have to 'work the old way', jumping from their ERP system to their CRM system to Excel to Skype to Outlook. All of the tools they use every day reside in a single interface.

Get Your Head in the Cloud

Let's talk about the cloud. It's not so mysterious. If you've uploaded photos to Instagram or Facebook, you've touched the cloud. If you store files in Dropbox or used one of those online services to back up your computer, you're a cloud user. And if you

use Microsoft Office 365 – a business software solution capable of close integration with Microsoft Dynamics 365 — then yep, you’re cloud-savvy.



TECHNICAL
STUFF

If you’ve ever had to connect to the company server from a hotel room or airport, you probably used a VPN, short for virtual private network. A VPN connection is a secure way to ‘tunnel’ through a corporate firewall to access data or software. VPNs are, however, a little cumbersome to set up and take a short amount of time to connect. The good news is that cloud services such as Microsoft Dynamics 365 rely on a secure web connection known as https, a simpler and faster way to access virtual corporate assets.

What the heck is a cloud, anyway?

Those of us so inclined can easily make our own cloud. Simply build a photo sharing or file storage website on your home computer, open a ‘port’ (like a virtual door) on your home’s Internet connection, and let people upload data. Of course, that’s not a great idea, because there are all kinds of ‘bad folk’ out there just waiting to hack into your new computing adventure, and unless you’re way beyond the beginning stage of network security and server management, it’s likely to go bad for you. Also, you’ll need to invest squillions in hardware and hire some high-paid computer geeks to manage it all. Yet that’s exactly what Microsoft, the global nexus of computer geekdom, has done with its Azure cloud services platform.

Hey, where’s my data?

The cloud is good for far more than social networking and sharing pictures of the kids with your sister in Birmingham, however. The cloud is also a great place to store a database, Excel and Word files, email, and just about anything else that, until recently, was almost exclusively kept on desktop and local server hard drives. And because the data is stored there, the cloud is a logical place from which to operate software such as Dynamics 365.



TECHNICAL
STUFF

Latency is the time it takes for a packet of information to get from one place on a network to another place on the network. If you’ve ever waited a few minutes for a big photo or PowerPoint to download to your desktop (who hasn’t?), that’s latency. It’s an important consideration when evaluating a cloud-based system,

because if latency is high, you will be unhappy. Be sure to check it out, and do so at multiple times during the day and at night. The good news is that most cloud-based solutions have latency well under control, and it's nowhere near the problem it was a decade ago.

Why the cloud is heavenly

Aside from letting someone else worry about computer viruses, nightly backups, power surges, and all the other tedium that comes with managing 'on prem' servers and software systems, the cloud makes collaboration and remote access easy. For example, travelling sales people (they are travelling, right?) can simply go to a website on their smartphones or laptop computers to generate a quote, then push it over to customer service for follow-up. No more need for a VPN connection or driving back to the office. Engineers can collaborate in real-time with purchasing or production on component designs. The boss can login from home to check on a sales order or look at this month's profit margins before deciding how big the quarterly bonuses will be. The cloud, quite simply, makes everything easier.

SUBSCRIPTIONS: MORE THAN MAGAZINES

Time for another acronym: SaaS, which is short for *Software as a Service*. Most anyone who's tried it has become a card-carrying member of the SaaS fan club. For a small monthly fee (no, really), SaaS users have access to a cloud-based software package and, in many cases, unlimited data storage. Engineers use SaaS to access CAD software. Homemakers use it to organise recipes and prepare grocery lists. And, of course, businesses use SaaS for their needs. The beauty of SaaS is simple: no more worrying about patches and updates. No more backups. No big investment up front for software that will be obsolete in a few years. As long as you have a laptop computer or smart phone (and continue to pay that small monthly fee), your software and information is available anywhere in the world. SaaS is the bomb.

Meet your host

Available in over 140 countries, Microsoft Azure is a leader in cloud-based hosting. The company has invested more than £12 billion in IT infrastructure globally, with hundreds of datacenters located in 50 regions around the world – in Europe, for example, Microsoft delivers Dynamics 365 from data centres in the UK, Dublin, Amsterdam, and Germany. In addition to its Dynamics 365 suite of intelligent cloud services, Microsoft offers more than 60 cloud-based products, including database platforms, virtual machines, online backups and storage, process automation, and more.

Configuration Not Customisation

One of the most teeth-clenching aspects of traditional ERP implementations is FRICE: forms, reports, interfaces, conversions, and enhancements. It's the time when a bunch of highly paid ERP consultants and software engineers make your new system look and act like your old ERP system.

It typically requires months of work on both sides of the fence. The business users must collect all the different reports, dashboards, and screenshots used each day, then document each in such a way that someone who doesn't work there (the consultant) can understand. The consultant then goes away and begins customising the software to meet your company's supposed needs. It's expensive, time consuming, and in some cases, completely unnecessary.

Microsoft Dynamics 365 comes preconfigured. That means it leverages industry best practices in a way that makes your business more efficient, without the need to reinvent what might just be a broken wheel. Yes, you can put a custom logo on your shipping documentation. Yes, you can pick whatever colour scheme eases your tired eyes. Yes, you can decide what data requires populating, and which does not apply to your business model. Yes, you can develop your own dashboards and business intelligence tools. But you can say goodbye to FRICE (and its expense).



WARNING

Even though preconfigured systems require far less effort from the IT department, it doesn't mean you should send your computer engineers and software developers packing. Because these folks have intimate knowledge of the way things work in computer-land, freeing them from the drudgery of report writing and routine software updates gives them time to do what they're best at: finding innovative ways of leveraging technology to improve your business.

A Quick Peek Under the Covers

Let's take a look at what Microsoft Dynamics 365 brings to the table (see Figure 1-3). As with all ERP systems, Dynamics 365 is broken down into many functional areas including:

- » **Microsoft Dynamics 365 Business Central:** Built on the same platform as Dynamics NAV, Microsoft Dynamics 365 Business Central is all that you'd expect from any world-class accounting system and more: payables and receivables, ship and schedule products, chart of accounts and general ledger, fixed assets, bank reconciliation, all within an easy-to-use interface with the look and feel of the MS Office tools you already know.
- » **Microsoft Dynamics 365 for Sales:** Help your sales and marketing team be all that it can be. Microsoft Dynamics 365 for Sales is a tool designed to help grow the business, capture additional sales opportunities, and integrate with LinkedIn Sales Navigator. From marketing events and quote tracking to business insights and pipeline management, sales team members will have access to a single version of the truth, and the ability to do so while on the road or in the customer's lobby.
- » **Microsoft Dynamics 365 for Customer Service:** Happy customers tell others. Unhappy customers tell everyone. That's why Microsoft Dynamics 365 for Customer Service is designed to make the customer experience memorable (in a good way). Built on Microsoft CRM and tightly integrated to the other parts of Dynamics 365, the Customer Service module helps personnel manage and route cases, manage contracts, process sales orders, and establishes the baseline for monitoring customer satisfactions levels.

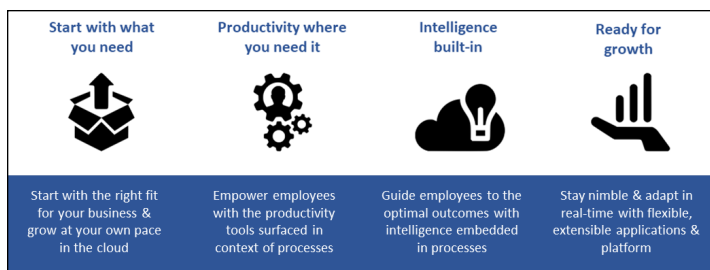


FIGURE 1-3: Microsoft Dynamics 365 offers a robust cloud service solution for all business CRM and ERP requirements.

There's lots more ground to cover. Just know that for a small-to medium-sized business, Microsoft Dynamics 365 is a single, flexible, and robust cloud service solution for all business CRM and ERP requirements.

- » Understanding the components of good financial software
- » Evaluating your accounting and financial management needs
- » Understanding what Dynamics 365 Business Central can do for you

Chapter 2

Managing Financials Dynamically

Maybe you're the owner of a small plumbing company, faced with an audit of last year's taxes by Her Majesty's Revenue and Customs. Or perhaps you're the chief accountant at a retail firm, one with five stores – two of which are showing poor performance – and are preparing for a review by upper management. In these and countless other everyday examples, people like their books to be balanced.

But good accounting practices go well beyond making sure both sides of the ledger match. Sure, accountants and controllers must have accurate figures, but they should also have a firm handle on what monies are coming in, what's going out, and be able to accurately forecast company budget and sales figures. Yet even these basic accounting functions can be difficult to accomplish without fast and friendly – yet powerful – accounting software.

Viewing the Big Financial Picture

Hold on. Unless you're sitting in jail for tax fraud, you might be thinking that you've managed the company's finances quite respectably for some time now, using nothing more than

Microsoft Excel, a nine-year-old version of QuickBooks, and your own far from insignificant knowledge of UK GAAP rules.

Why should we bother investing in new software, never mind disrupting a steady and predictable financial workload, you say? We're rolling along just fine right now, thank you, and we don't need all the hassle.

Fair enough, but first ask yourself a few questions:

- » How much time does it take to prepare monthly reports for the management meeting? Thanks to this burden, have you become a master of Excel pivot tables? And are you the only one in the company that can generate all the various reports and dashboards everyone has come to rely on, and constantly being asked to slice and dice the data in different ways? Sounds like you need a better reporting tool.
- » Do you occasionally run across duplicate data? Worse, do you sometimes have to enter the same data in different systems? Is it difficult to filter a column because people can't seem to spell the customer's name or input a customer's address properly? Without data accuracy, you're lost.
- » Is data entry at your company an overly manual process? Are you feeling knackered at each month-end close, typing endless figures into your computer through the wee hours of the morning? Do you wonder if there's some way to automatically transfer shipment data from the warehouse to the accounts receivable module in your legacy system? Modern accounting software like Microsoft Dynamics 365 Business Central automates much of this drudgery.
- » Are there silos of information scattered about the company? Do you as the person responsible for budget preparation, expenditure reporting, collecting receivables, and more have to extract information from different software packages, pulling everything together into a single Microsoft Access database or mother-of-all Excel spreadsheets to analyse it? It doesn't have to be like that.
- » What about security? Do you ever lie awake at night wondering who has access to what? That maybe the IT person (who's named Reginald, wears too much hair gel, and at times can be seen peeking over the cubicle walls) might have hacked into the accounts system? And what about hackers? There are 'a lot of dodgy dudes' out there. Is your system really safe?

NAVIGATING THE STORMY SAAS

In 2002, Microsoft acquired the industry leading software system NAVISION from Danish software developer PC&C A/S (Personal Computing and Consulting). The company immediately set about improving and expanding this already powerful accounting package, renaming it Microsoft Dynamics NAV ERP (Enterprise Resource Planning) and taking it far beyond traditional general ledger, payables, and receivables functionality into ‘the rest of the business’ to include quoting, order entry, purchasing, shipping, and invoicing.

Over the past few years, however, Microsoft has expanded its vision for this flagship product for small and medium businesses (SMB) with the ‘SaaSification’ of Dynamics NAV, an effort that has given us Dynamics 365 Business Central. But what does SaaS (Software as a Service) really mean? Simply put, SaaS puts NAV ‘in the cloud’, making it accessible anywhere, anytime, and for a much smaller investment than with traditional on-premise ERP implementations. It’s way better than pub grub and a pint of bitter.

I bet you answered yes to at least a few of these questions. More? Don’t feel bad. Many companies struggle with their accounting systems, most of which were developed when Hong Kong was still a colony and long before Tony Blair started his third term as Prime Minister. Luckily, robust software solutions are available, and they won’t be nearly as tough to implement as you might think.

Introducing Dynamics 365 Business Central

Oh great, you’re thinking. Another software system. Everyone knows that big software companies repackage their old wares every few years, slapping on a fancy name but offering little in the way of meaningful functionality. It’s like putting lipstick on a pig.

Some do just that. But that’s not the case with Dynamics 365 Business Central. It’s been completely revamped with the cloud in mind. True, some of the best parts of Dynamics NAV remain,

especially those that hundreds of thousands of NAV users have come to depend on for their day-to-day activities. But to say there's no meaningful changes to the software is like calling the Queen a cheeky monkey.

A single solution

For starters, Dynamics 365 Business Central is integrated. That means users can manage the entire quote-to-cash process from a single familiar interface – Microsoft Outlook. Enter quotes, track purchase orders, check on inventory, and correspond with customers and sales people, all from one screen. It's about as difficult as sending an email.

Best of all, Dynamics 365 Business Central doesn't force users to abandon other familiar Microsoft Office tools. In fact, it makes those office products much more comprehensive. By all means, keep using Excel if you like, but it will now be linked directly to the Dynamics 365 database.

Microsoft Word is no different – whether composing a thank-you letter or sending off a past due notice, customer information such as email addresses and phone numbers are at your fingertips. And the coolest part is this: it's a two-way connection. Using the appropriate Excel data connector or SharePoint integration, many Office 365 documents can be opened from within Dynamics 365 and the changes saved automatically. Try that in your legacy system.



REMEMBER

Whether you're trying to get the contacts synced between your smartphone and laptop computer or need your mega-buck warehouse management system to talk to the freight carrier's web-based logistics tools, two-way integration is an indispensable feature found in many modern software systems. You'll wonder how you lived without it.

Delightful dashboards

At some point in your life, you probably found yourself stuck in traffic and pounding your fist on the dashboard. Maybe that event left a bad taste in your mouth. But dashboards are actually good things, at least if they're easy to build and – more important – simple to maintain.



TIP

Need to analyse data from multiple sources such as Excel, Microsoft NAV, legacy systems, and more? Microsoft has developed a suite of business analytics tools called Power BI (short for *business intelligence*) to do just that. Integration with Microsoft Dynamics 365 Business Central is both fast and seamless, so users can easily create and publish reports and personalised dashboards, then share them across the entire business, even on mobile devices and the web (see Figure 2-1).

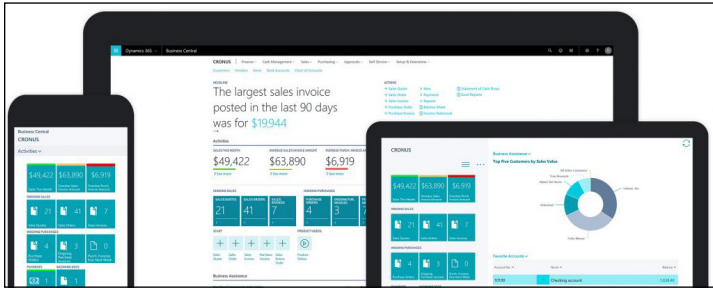


FIGURE 2-1: Dynamics 365 Business Central provides users with the ability to perform real-time analysis of business processes using Microsoft Power BI.

For example, say your manager just told you she needs a dashboard showing this year's revenue volumes in the West Midlands, and she wants it by lunchtime. Oh, and break it out by product and sales team. No problem. Really cool-looking dashboards are easy with Power BI, and they'll soon have you looking like the bee's knees with your boss.

Faster financial insights

Of course, Microsoft Power BI also makes financial reporting that much easier. Take apart the accounts payable watch or explore new ways of looking at the general ledger. Don't want to spend your days building dashboards? The system comes loaded with dozens of prebuilt dashboards you can use as-is or tweak however you like.

THERE'S AN APP FOR THAT

Sorry to throw a spanner in the works, but no software system is everything to everyone. Microsoft realises this, which is why a bevy of third-party applications are available to Dynamics 365 users. Anyone who can manage a smartphone will have no problem downloading any one of hundreds of apps designed to enhance and expand the user experience. Need a sales and inventory forecasting tool? How about a way to import Intuit QuickBooks payroll files, or a search and replace function to perform some data cleanup? Log on to the Microsoft AppSource with your Office365 credentials, download the app, and get to work, you slacker.

Improving Your Processes

Convinced? Jolly good. But before investing in any new software tool (even a 'pay as you go' solution like Microsoft Dynamics 365 Business Central), it's a good idea to get a handle on your current situation. In business parlance, this is known as 'defining business processes', and is an activity that helps businesses know where they are, where they're going, and whether all the effort they just spent learning and adapting to a new software system was worth it (see Figure 2-2).

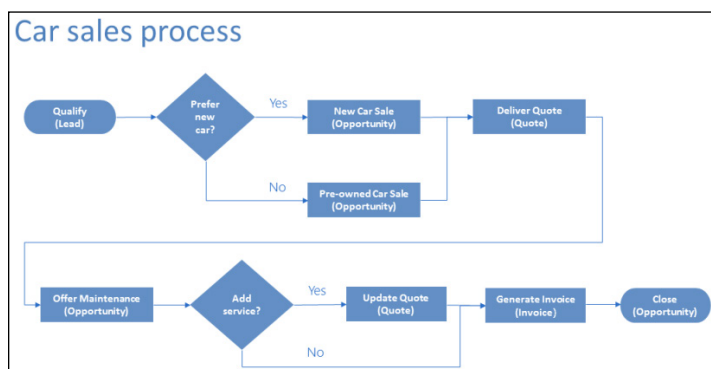


FIGURE 2-2: Defining business processes is important no matter the business.

SPENDING MONEY YOU DON'T HAVE

If you're an accountant, you might have a picture of him hanging in your office. You almost certainly studied him in college. And whether you agree with his theories or not, few would argue that British economist John Maynard Keynes was one of the most influential people of the twentieth century.

Keynes' 1936 book *The General Theory of Employment, Interest and Money* was widely criticised, making it ironic that his suggestion that governments should be allowed to spend more money than that available to them was embraced during the post-war reconstruction and subsequent economic expansion, and has arguably helped stabilise market fluctuations ever since.

Though many of his concepts have fallen out of favour over recent years, it's clear that his impact on macroeconomics throughout the past century has been substantial. And for those considering a new ERP system, his quote, 'the difficulty lies not so much in developing new ideas as in escaping from old ones' is especially appropriate, highlighting the need in this and other business situations to throw out the old ideas in favour of the new.

Growing the Company

Everyone likes growth. When the company grows, the little people at the bottom of the food chain become middle managers, the middle managers get to move out of their stuffy cubicles into offices with windows, and the old sod in the corner office goes on more vacations. Everybody wins.

To achieve company growth, however, you first require robust tools (robust sales don't hurt either). These tools provide managers with the visibility needed to make better decisions and give them the opportunity to use their skills in a way that nurtures company growth and improves cash flow. With powerful analytics

and a seamless, smoothly functioning financial system, companies are better able to:

- » **Gain insights.** Are you making the best use of your data, or simply drowning in it? Can you spot sales trends, predict market upticks and downturns, and prepare for them well in advance? If you have the right BI system, you'll be able to do this and more.
- » **Improve productivity.** Being productive means far more than decreasing takt time on the shop floor. It means not wasting time on data entry, finding and cleaning up mistakes, or generating endless financial reports. Modern ERP systems like Microsoft Dynamics 365 have built-in automation capabilities, eliminating the drudgery of these and other accounting tasks.
- » **Reduce costs.** Expense tracking and cost cutting is easier when your accounting software works with you rather than against you. Microsoft Dynamics 365 Business Central makes it easy to see what your team is doing, giving you the ability to take the timely steps needed to prevent waste.
- » **Improve security.** Carrying the cost reduction mantra a bit further, remember that Microsoft Dynamics 365 lives in the cloud. This not only allows companies to reduce IT costs and simplify software maintenance, but guarantees that sensitive company data is protected, backed up, and secure from prying eyes.
- » **Connect with customers.** With the ability to spot market trends in advance, your team will be armed with the tools they need to proactively engage with customers. Also, a single source of the truth for contact information, sales and receivables history, profit margins, and more will go far to streamline customer service and marketing operations.
- » **Improve collaboration.** A unified cloud-based system will also increase collaboration opportunities from within. Operations will more effectively talk to engineering, engineering will find it easier to collaborate with purchasing, purchasing can reach out to sales and upper management, and finance will have the greater ability to interact with all of these departments. Quite simply, teamwork is easier with Microsoft Dynamics 365.

Put it all together and you'll see: there are some very compelling reasons to unplug your old system and move to the cloud.



Before pulling the trigger on a new accounting system (or any system, for that matter), be sure you've engaged the key players across the business, starting with upper management. If you don't have company consensus, it's going to make this quantum shift in thinking more challenging than it needs to be.

Gaining a Better Bottom Line

Increase the turnover all you like, but if you're not profitable – that is, making more than you're spending – you might as well lock the office door and go home. But how can you do that without a clear vision of your products' profit margins, employee efficiency, cash flow, asset valuations, and any of a hundred other metrics that together determine the company's bottom line?



You may not see it today, but the ability to bring all of your company data and documents into a single environment is invaluable. Productivity will increase throughout the company. Customer satisfaction will improve because your employees will have greater insight into their needs. And your financial team will have the visibility of what's important and what's not.

All of these factors lead to one thing: a better bottom line. We'll explore plenty of additional reasons for migrating to a new financial, sales and marketing system in future chapters; but, for now, just know that Microsoft Dynamics 365 Business Central has some awesome capabilities for helping your company improve its financial position.

- » Chasing leads
- » Engaging customers
- » Taking (and giving) orders
- » Transforming your sales department

Chapter 3

Improving Sales Dynamically

Relationships are important. Whether it's your spouse, your teenage kids, or that annoying neighbour who plays Ed Sheeran full blast at three in the morning, getting along with others is something all of us should strive for.

This is especially true of your customers. Without happy customers placing regular orders, you'll have nothing to do but cheat at Scabby Queen all day. Employees can't be paid and the rent will be late. Everyone loves good customers.

We talk more about how Microsoft Dynamics 365 helps to establish and improve customer relationships through this chapter and the next, but for now let's discuss one of the most fundamental tasks in any business – managing customer data.

Kicking Butt and Taking Names

Maybe you have an old Rolodex on your desk. Yes, I like mine too, but between the mobile phone numbers, email addresses, Facebook, Instagram, and LinkedIn profiles, I'm running out of room. And keeping track of customer activity such as sales leads and order history, or setting reminders for follow-up calls? Forget it.

Wouldn't it be bonkers if there were a single place for every piece of information about a customer or prospective customer? No more flipping through the Rolodex or searching through file cabinets, no more humungous Excel lists or standalone Customer Relationship Management (CRM) systems, just one single source of customer truth.

Better yet, what if all that information could be shared with everyone in the company, even those remote sales people who pretend they're too busy to come into the office for Monday morning meetings? How cool would it be if order history, shipments, outstanding deliveries (especially the late ones), were all available with a single mouse click?

All together now

That's where Microsoft Dynamics 365 for Sales comes in. Thanks to its seamless integration with the Business Central, Marketing, and Customer Service applications – indeed the entire Dynamics 365 suite – everything you need to know about customers and their sales activities is available in one place.

And let's not forget about integration to Office 365. Need to do a quick analysis of projected sales activity in the Southampton region for the next 90 days? It's blindingly easy to not only open and analyse the data in Excel, but also save any changes back to Dynamics 365 when you're done. Consider these advantages:

- » An all-encompassing, integrated sales system means everyone in the company uses the same information. Chris sees what Mary sees, and Mary sees what Nick sees. Islands of information are eliminated.
- » Using a common software system leads to business processes becoming more consistent and streamlined. Everyone becomes more efficient.
- » Got SharePoint? This powerful Microsoft tool interfaces directly with Dynamics 365, making viewing and linking of sales documents and marketing materials simple.
- » Because everything needed to do your job is in one place, employee efficiency is greatly improved. The boss will be so thrilled that everyone is sure to get a nice raise.
- » Data quality is also much better. No more duplicate entries, conflicting information, or fat-fingered records.

- » Thanks to Microsoft Dynamics 365's mobility features, customers and sales opportunities can be acted upon from smartphones and remote locations. It's okay, you can still take a summer holiday.
- » Forget to follow up with a customer last week? Not anymore. The Microsoft Dynamics 365 Relationship Assistant will send you whatever reminders you need.
- » Since everything is stored in a secure, password-protected database, there's little risk of someone walking away with hard-earned company data.

There's also better visibility to open orders, potential delivery delays, marketing efforts, and other critical activities – no more guessing, no surprises. Real-time analytics are as easy as opening a dashboard, a prebuilt template, or performing a simple query. And for sales managers, helping your employees with fact-based performance feedback becomes much easier. Everyone's happy – especially your customers.

CAPTURING SUCCESS

Think about all the email you get every day. Now multiply that by several dozen or even several hundred employees. That's a lot of untapped data sitting in everyone's Inbox; worse, it could mean a lot of lost data if email users are careless or disaster strikes.

Most companies use Microsoft Office 365 to mitigate the risk of lost email messages and attachments, but that does nothing to assist with actually using this goldmine of untapped corporate information. But thanks to its Auto Capture function, Dynamics 365 can track messages automatically based on criteria you set up.

Want to see all of the email messages related to the big project you've been working on for the past six months? You could sort, search, and filter your Inbox, or create a complicated folder structure to keep everything in one place, but both of these approaches are time-consuming and tedious.

Auto Capture eliminates this effort. Click the Activities column in Dynamics 365 for Sales and you'll see every email message related to whatever record you have active. Messages remain private unless you decide to share them with others on your team, which is as easy as marking them 'tracked email'. You'll never curse at your Inbox again.



The Auto Capture, Email Engagement, and Relationship Assistant functions are all part of the Microsoft Dynamics 365 embedded intelligence feature. It's not turned on by default, and each user will need to give the system permission to have his or her email monitored, but your IT support person or a Dynamics 365 partner such as GCC will be happy to enable this timesaving utility. It's quite simply brilliant!

Welcome to the hub

Hubs are awesome. Bicycle riders appreciate hubs for keeping their wheels turning true. Air and rail hubs make travelling easier. Technogeeks use hubs to connect multiple computers or to relay large numbers of email messages. Hubs are everywhere.

If you're sitting in front of a computer or smartphone running Dynamics 365 for Sales, you're probably familiar with another kind of hub. It's called – you guessed it – the Sales hub, and like the hubs found in bicycles and travel-friendly cities, it makes life a little simpler.

Sorry, I got ahead of myself. There are actually two ways to interface with Dynamics 365 for Sales, but hubs are so cool that I jumped to the end of the story, just like my wife does when she's watching a suspenseful movie. It's irritating. Anyway, here they are:

- » **Sales:** The Sales app (short for *application*, a fancy term for a software tool) is the default way to access sales and customer information in Dynamics 365. Sales processes can be automated, and performance monitored, all from one location.
- » **Sales hub:** Offering the same functionality as the Sales module, the Sales hub is optimised for mobile users. Those speed and usability enhancements carry through to the desktop as well, however, making the Sales hub the go-to place for virtually all sales-related activities.

Dynamics 365 has other hubs. There's the Project Resource hub, for example, or the Field Service hub. I get to them in Chapter 5, but for now, take a few minutes and check out the Sales hub (that's assuming you've taken the smart step of implementing or upgrading to Dynamics 365). It's just one more way to make your job easier.

THE UNIFIED INTERFACE

It used to be that accessing software on a tablet or smartphone was a nice-to-have, and the real work was done on an actual desktop computer. That's all changed over the past few years. People are now doing just as much (or trying to, at least) on their mobile devices as they are at their desks. Microsoft recognises this, which is why they introduced one global interface for desktops and devices making changes quick, easy to deploy, and as user-friendly as possible.

It's called the Unified Interface, and most of the core functions within the Sales and Customer Service apps have been optimised to work within this environment. It offers a number of productivity enhancements, including faster navigation, better sizing and resolution regardless of the screen size (also known as an extensible control framework), and other functions to make your day at work a little less stressful.

Selling Smarter

Those who write and sell business software will point to all the cool features in their systems including their systems' scalability, reporting capabilities, and possibilities for integration. Those are important considerations, to be sure, and each must be carefully investigated before pulling the trigger on any software package. But what's even more important than specific features is how the software will help your company become more efficient.

From a sales perspective, this means closing more deals, making customers happier, and generally doing more with less. It means visibility to every part of the supply chain, without having to ask the IT department to write a new report or open multiple systems.

In a perfect world, software should be invisible to you and your users, not in your face. In order to achieve this level of perfection, however, you need tools that provide almost scary intelligence,

able to determine what steps you the human should do next to bolster customer relationships:

- » Smart software keeps an eye on industry trends by monitoring LinkedIn and other social media sites.
- » Smart software lets you know when a customer has ignored your last three emails, signalling trouble.
- » Smart software tells you when a shipment might be late, giving you an opportunity to expedite or call the customer before the train runs off the track.
- » Smart software knows when the competition just expanded their facility, acquired another company, or introduced a new product line.
- » Smart software alerts you to new sales opportunities. It fosters business relationships. It tells you when a customer maxed out their credit limit and it's time for a visit or phone call to see what's up.

Bells and whistles are fun to see during sales demos, but all that really matters to business software users is this: what can you do for me today? How can you make my job easier? What's most important to my customer, and how can I deliver it? That's what smart software does, and unless you take a look at Dynamics 365, you'll never know just how smart software can really be.



REMEMBER

Email has evolved from an easy way to avoid talking to people into a critical part of any successful business strategy. Until someone invents a human version of the Vulcan mind meld, email will remain the most efficient, most foolproof way of documenting everything that happens between buyer and seller. But without the right software, one that's seamlessly integrated with your company's Exchange server (the leading platform at businesses everywhere), email's full potential cannot be achieved, and often becomes more of an obstacle to success than a way to achieve it.

Adapting to the New Way of Doing Business

Let's talk about some of the ways modern business software like Microsoft Dynamics 365 works, using a typical sales department as an example. This involves a number of normally mundane

tasks such as building quotes and entering orders (hopefully in equal numbers), tasks that Microsoft has taken extreme pains to make as simple as possible with a function called Quick Create.

As the name implies, Quick Create is a fast way to create nearly any 'record' in Dynamics 365. If you're wondering what a record is, flip open your Rolodex once more – see each of those cards? Those are the paper equivalent of database records, except that entering and navigating them in Dynamics 365 is much simpler, and there's no risk of papercuts besides.

The next few sections cover some of the basic processes associated with Dynamics 365 for Sales, each with its own database and record-related activities. Don't worry, though, you'll like what you see, even if you don't necessarily like software.

Qualifying New Leads

Suppose your company services the commercial flower industry. The leading salesperson Kathy just had lunch with George, a representative for your fertiliser supplier, who mentioned to her that there's a new greenhouse going up on the west side of Bristol, just past the observatory. He writes a name and phone number on the back of his business card and hands it to her. 'Call this chap', he says.

Lunch over, Kathy heads out to the car park and enters the information into her mobile device. It's her first lead of the day. Her boss calls five minutes later. 'What's with this greenhouse in Bristol?' he says, Dynamics 365 having alerted him to a new record in his territory.

After assuring her often micro-managing boss that she's on top of things, Kathy calls the number on the back of the card. Tim of Failand Flowers tells her she has excellent timing. Yes, they are a startup company specialising in roses and lilies, and would love to speak with her about growing supplies. Kathy schedules a visit, enters the details of the call in the Dynamics 365 mobile app, and sends a follow-up email to confirm.

The lead has now become an opportunity, and everything about the potential client – including email address and appointment – has become part of her employer's Dynamics 365 database. If Kathy were to be reassigned or decide to quit and become a

professional cheese roller, someone else could easily pick up where she left off.

Developing Relationships

That following Friday, Kathy and Tim meet at the job site. The greenhouse is coming along brilliantly. Tim gives her the highlights of Failand Flowers' business plan, and she makes several equipment recommendations. She also discovers which of her competitors have been calling on Tim (Kathy's sneaky that way), the name of Tim's boss, and who else at the company might purchase growing supplies from her.

Back at the office, Kathy brainstorms with the other members of her team. Because she entered all the relevant information minutes after leaving the site, everyone has complete visibility to the prospect. They research Failand Flowers on LinkedIn and Facebook, link that information to the customer record, and develop a sales strategy. And since their company has a SharePoint system, all relevant product data and marketing materials are easily tied to the customer record. It's time for a quote.

Proposing a Solution

Since Dynamics 365 is an integrated system, all Kathy has to do is click 'Get Products' to pull in the equipment recommendations she made at the site. Quantity-based discounts are automatically applied, but Kathy decides to override the standard discount with an additional ten per cent off. She really wants this business. She activates the quote and emails it to Tim. Her boss gives her a high-five and tells her to have a good weekend.

Closing the Deal

Good news. By Monday afternoon, Kathy receives an email from Tim, accepting her proposal. She converts the quote into a sales order, checks with her supplier on delivery, and emails Tim back with a date. Kathy heads to the pub for a well-earned pint.



REMEMBER

Once the order is in place, the procurement team will use the Dynamics 365 Business Central app to place a purchase order, using the information found on the sales order as the starting place. The shipping lads will be happy because the order was drop-shipped to the customer and they can go back to racing forklifts through the warehouse, so it's up to the bookkeeper to generate an invoice, collect cash, pay the supplier, and all the other obscure tasks those blokes do each day. Whatever it is, it will take far less time now with an integrated system.

That's a Wrap

As you can see, each of the activities just discussed builds on the previous one. No effort is wasted, no information entered more than once. And, unlike some systems, Dynamics 365 gives everyone in the company – provided they have the proper permissions – visibility to everything that's going on around them.

Nor is there a need for special reports (although you can certainly generate some if you're into that sort of thing) because Dynamics 365 is chock full of dashboards, templates, ad hoc query tools and, as previously mentioned, complete integration with Microsoft Outlook, Word, Excel, SharePoint, and more.



TECHNICAL
STUFF

There are also dozens of third-party apps available. DocuSign for Dynamics, for example, supports e-signing of documents – no more killing trees. Maplytics provides routing information and territory management, PowerMailChimp lets you spam like there's no tomorrow, and the Attachment Management app is . . . well, you get it.

Granted, other software packages use similar terminology and business processes not unlike those just discussed, but you'd be hard-pressed to find one as comprehensive and easy to use as Microsoft Dynamics 365. And because Dynamics is in the cloud, it's accessible from a hotel room, a golf course, and anywhere there's an Internet connection. It's quite simply going to transform your business.

- » Teaming up with sales
- » Designing customer journeys
- » Building better leads
- » Getting social
- » Collaborating with the entire company

Chapter 4

Marketing Your Company's Future

The leads are weak. Coffee's for closers. Get them to sign on the line that is dotted. For those who saw (and hopefully enjoyed) the stage version of the movie *Glengarry Glen Ross* at London's Playhouse Theatre, there was a clear message that anyone in business can appreciate: sales and marketing is hard work.

The good news? Microsoft Dynamics 365 for Marketing makes it a whole lot easier. With a host of tools designed to simplify everything from lead creation to event management – and do so in a transparent, seamless manner – you'll find that marketing has never been more effective.

So hang on to your bowler as we pick up where the previous chapter left off, exploring the opposite but equally important side of the sales coin: marketing. You'll soon know your onions about terms like MROI and event-driven automation, and discover how to take customers and potential clients on a journey without ever leaving the office.

Exploring the Core

Glengarry Glen Ross may have been a brutal, often uncomfortable look at the sales process, but it did offer a number of valuable concepts, including A.I.D.A., which is short for Attention, Interest, Decision, Action. It's the development of those first two terms – attention and interest – that falls to the marketing department, because if the blokes there do their jobs right, the decision and action part of this all-important equation are sure to follow.

Microsoft Dynamics 365 for Marketing is an integral part of the Dynamics 365 suite of business software. As with the other applications within Dynamics 365 (feel free to call them apps), marketing shares information with sales, sales with customer service, customer service with operations and finance. They're all tied together, eliminating wasted effort and streamlining every part of your business.

Here are a few of the core functions within Dynamics 365 for Marketing, along with a glimpse into how they'll help you and your team become more effective:

- » **Campaigning like Lord Nelson:** Marketing campaigns aren't quite as scary as going to war, but it can sure seem that way at times. Fortunately, Microsoft makes campaign management about as difficult as walking the dog. Every activity is tracked and the results shared with the entire team; lost sales leads and missed opportunities become a thing of the past. With Dynamics 365 for Marketing, all your campaigns will be as successful as the Battle of Trafalgar (despite Lord Nelson's demise).
- » **Email, elevated:** All business management software out there has some level of email functionality these days, so why even mention such an obvious and necessary function? As you'll see in the next section, Microsoft has taken email-based communications to a level you can't imagine (the company did invent Outlook, after all). Dynamics 365 makes email fast, automated, and extremely well-targeted. You'll be completely gobsmacked over its capabilities.
- » **Events well-executed:** Marketing and sales events mean much more than tired feet and stale sandwiches. They can and should be fun activities during which you learn about

your target market, gather customer information and requirements, and make a few friends along the way. And if you're worried about the costs (these things can be expensive), every penny spent on literature, signboards, hall rentals, or cocktail napkins is visible within the Dynamics 365 operations and finance modules.

» **More successful surveys:** Few of us like taking surveys, and chances are good that your prospective customers don't either. The sad fact remains, though, that aside from buying someone a beer at the corner pub, surveys are one of the most effective ways to find out what others are thinking. Not only does Dynamics 365 for Marketing make surveys easy to generate, but easy to answer as well. And collating the results? It's like falling off a bike, except it doesn't hurt when you land.

Of course, these are just a few of the key features in Dynamics 365 for Marketing. There's also robust contact management, webinar functionality, automated lead and client ranking (see Figure 4-1), customisable forms and email templates, analysis tools, dashboard and reporting capabilities . . . the list goes on. You owe it to the marketing department to take a look.

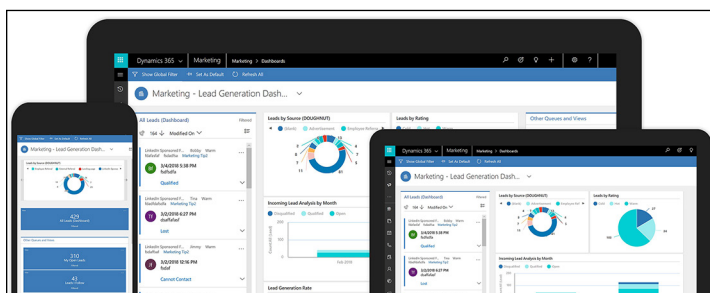


FIGURE 4-1: Dynamics 365 for Marketing lead dashboard on all platforms.



**TECHNICAL
STUFF**

Having a hard time meeting your marketing budget? There's a secret acronym bandied about in the accounting office that anyone looking at business software should know. It's called MROI. Deciphering the term isn't too hard – it stands for Marketing Return on Investment – but actually achieving it can be enough to drive you off your trolley. That's why it's a great idea to look for a package designed specifically with the marketing chaps in mind because, without them, sales suffer and profits go down the pan.

Taking Customers on a Journey

Everyone likes to take a trip. This is especially true if someone else books the flights, arranges the ride to the airport, and sets you up with wonderful meals and entertainment to your liking. Dynamics 365 for Marketing helps you do the same thing for your prospects and customers, taking clients on a tailor-made journey to show them, ‘I feel your pain, and this is how we’re going to make it go away’.

Suppose you’re a marketing person (a fair assumption, else you’d be reading the latest J.K. Rowling novel right now) and you’ve been charged with developing leads for one of your company’s latest offerings – a new line of diesel engines, say, or an expansion into residential landscaping services. How will you go about it?



WARNING

You might take the standard approach and start firing off emails to everyone in your contact list. How’s that been working for you? Getting lots of responses? Do you even know whether they received it? The sad truth is this: unless you already have a rapport with someone, blind emails return little more than the tick, tick, tick of the wall clock as you count the minutes until quitting time.

Terrific targeting

Wouldn’t it be better to target prospective clients with emails that are interesting and informative? With interactive, personalised marketing messages that bring recipients closer to you rather than pushing them away? You’ve come to the right place.

As mentioned earlier, Dynamics 365 for Marketing takes email-based marketing efforts in an entirely new direction. Let’s walk through a customer-specific, automated email message, one of many possible steps in the customer journey:

- » If you’re familiar with the various templates embedded within Word or Excel, you already know where we’re going. Microsoft has taken this time-saving feature within the Office 365 suite (an integral part of Dynamics 365) and leveraged it for use as a starting point in powerful email messages (see Figure 4-2). Just select a template according to the market type or visual style and begin customising it to your needs.

And if you don't want a template, that's fine too – just open a blank document and get to work.

- » Within the graphical designer, you'll have the option of pulling in eye-catching pictures and videos as well as whatever supporting documentation is needed to get your message across. Change the columns, insert a header or hyperlink, add a 'send me more information' button; you'll have access to more styles and colours than a fashion consultant. You can even work directly with HTML (the language of the Internet) if you like. Don't worry, though – it's easy enough that even your Aunt Charlotte could manage it.
- » Think it's ready? You'd better give it a quick preview to make sure. If you don't like what you see, feel free to adjust it as much or as little as you want. Your changes are always saved, and you can undo things if you dropped a clanger somewhere (that's if the designer didn't already catch it). Once everything's sorted to your satisfaction, pick the contacts you want to receive it to and the system takes it from there, sending personalised messages to everyone on the list.

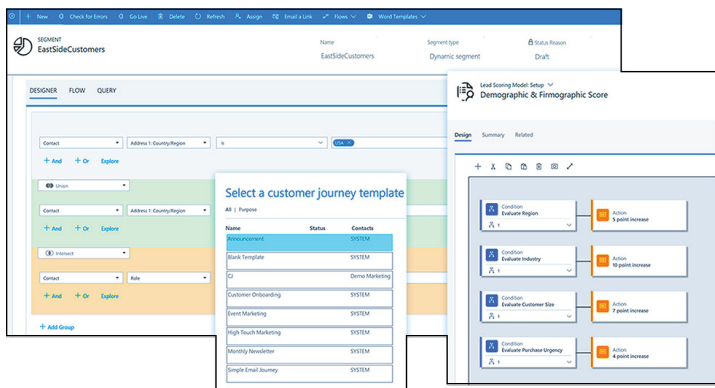


FIGURE 4-2: Dynamics 365 for Marketing provides customer journey email templates.

As you'll see a bit further along, this same designer can be used to create marketing pages on the corporate website, extend invitations to marketing events, set up interactive portals, and more. Sound nifty? That's just the beginning.

Wonderful workflows

Here's one of the coolest parts about Dynamics 365 for Marketing. Remember that part earlier about not knowing whether anyone was actually receiving your old-fashioned email messages? Not anymore.

Not only does the marketing app keep track of what went where, and to whom, it also records who opened it, when it was opened, and whether that person clicked on any of the buttons or signed up for the event you just promoted. And it does it automatically, so you can go on to other, more important things than wondering whether your campaign is effective.

They're called workflows. You'll find them throughout Dynamics 365, and if you're not using them today, you'll soon be a bigger fan of workflows than you are of Manchester United.

That's because workflows eliminate the drudgery of everyday tasks and make everyone in the company a more effective worker (without having the old gaffer in the corner office constantly looking over your shoulder). Here are a few of the swell things you can accomplish with a workflow:

- » Generate follow-up activities, such as sending the customer some information or checking on credit status.
- » Notify the sales team to get off their butts and go knock on some doors.
- » Initiate other workflows in response to the results obtained thus far.
- » Track progress on marketing campaigns, event invitations, portal visits, and more.
- » Rank leads based on their current status within the customised journey you've prepared for them.

This last point is especially relevant. No more hearing 'the leads are weak' from your sales team – with Dynamics 365 for Marketing, developing qualified, actionable leads becomes much simpler. Best of all, you'll have more time to do what you're best at: developing creative sales and marketing strategies that help make the company successful. I told you Dynamics 365 takes business to a new level.

BEING ONE OF THE GOOD GUYS

Think about all the emails you get every day, many of which are probably spam. Nothing turns off potential clients faster than filling their inboxes with worthless messaging. We've already discussed how Dynamics 365 for Marketing makes email-based communications more effective, but how does your mail server separate the wheat from the chaff? More important, what's to stop your carefully crafted messages from ending up in the Junk folder?

Here's what: Microsoft Corporation is an expert at all things email, and has extended that knowledge to Dynamics 365. Using nerdy email authentication technologies like Sender Policy Framework (SPF), DomainKeys Identified Mail (DKIM), and the mouthful of all acronyms, DMARC (short for Domain-based Message Authentication, Reporting and Conformance), Microsoft makes your company's email server best friends with your client's email server. Provided you generate useful 'non-junky' content and follow a few best practices (something a technology provider such as GCC can help you with) you'll never curse at your Inbox again.

Pages and portals

Aside from a section set aside for blog posts and company news, most corporate websites are relatively static affairs, constructed by an outside web development firm that charges a few hundred quid for each and every change. Wouldn't it be awesome if marketing folks could have their own website, a place for interactive, constantly evolving, customer-specific content?

This is the third leg of the customer journey. Using the Dynamics 365 for Marketing designer utility mentioned in the previous section, marketers can quickly develop and deploy web pages and customer-facing portals for everything from product documentation to customer service functions to weekly newsletters and promotions.

Want to invite people to a webinar on the new product launch? How about the customer appreciation day cookout, or a seminar on how your products or services will help prospects improve

their operations? You might do a mass mailing, or print out a few thousand fliers and pay some kid to plaster them on windscreens all over town, but these old-fashioned marketing approaches were outdated when the Fab Four were still playing at the Cavern.

There's a much better way. By leveraging web pages and customer portals, Dynamics 365 for Marketing users can:

- » Create brilliant web content that reacts to each visitor's individual needs, tracks their activities, and alerts you and other team members when it's time for the human touch.
- » Easily analyse what areas of the web page are getting people's attention and which ones need more work (and which parts might lead to questions like, 'What was I thinking?').
- » Give prospective clients self-service capabilities, such as signing up for events or looking up product information. Think how much time you'll save.
- » Nurture leads with follow-up literature, a webinar invitation, or a phone call based on what areas of the web portal were visited and which links were clicked.

That's just the tip of the marketing iceberg. For example, once leads reach a certain activity-based 'scoring' level, their contact information is automatically routed to the correct salesperson. 'Voice of the Customer' surveys can be created to determine industry likes and dislikes. Videos are easily embedded within your marketing page or targeted email campaign. Subscription centres allow visitors to opt-in to company newsletters, or forward them to a colleague.

If that's not enough, hundreds of third-party applications are available as well, including Facebook ad and content managers, stock photo providers, project planners, charting and reporting software, SEO (that's short for Search Engine Optimisation) tools, with more coming online each day. Each is certified by the Microsoft development team, and each installs in about as much time as it takes to get a cup of tea. It might not be as fun as a cruise to the Bahamas, but it's pretty darned close.

LINKING, LIKES, AND FEEDS

Social media is a marketing person's best friend. Take LinkedIn, for instance. With no more information than a person's name or the company they work for, it's easy to find out what they do there, who they report to, what they look like, where they went to school, and what their employer does. Once you have all that, you can invite them to be part of your network, follow them and their company, or comment on their posts to show them how much you appreciate their opinion.

Dynamics 365 for Marketing even allows you to import your and your team's contact lists for automatic lead generation. Similar functionality exists for Facebook, Twitter, YouTube, Pinterest, and Instagram, as well as a slew of analytics tools. If you're not already part of these communities, each presents new ways to meet and collaborate with others. It sure beats the heck out of cold calling (even for those who enjoy such things), and is far more effective besides.



REMEMBER

Unless you spend your evenings geeking out at computer clubs, all this talk about web pages and design utilities might have you a mite worried. Coding? HTML? Templates and properties? Don't worry, mate. If you can drag and drop, you can build a web page, portal, or interactive email. You don't even have to sweat over saving your work, because Dynamics does it for you. Who said you can't be a web developer?

- » Offering superior customer service
- » Making cases and creating queues
- » Getting out in the field
- » Effectively planning projects
- » Delivering on the details

Chapter 5

Servicing Customers the Dynamic Way

The marketers marketed, the salespeople sold. Now it's time to care for your hard-earned clients by wowing them with the best customer service they've ever experienced. Queries will be answered promptly. Due dates will be met. Service personnel will arrive on time, and no detail of any project will be missed, ever. Welcome to Microsoft Dynamics 365 for Customer Service.

Building Better Relationships

Everyone knows that price is important. So, too, is quality. But whether visiting a fast food restaurant or a dental surgery, it's the service they receive that customers remember, and is what brings them back for more. That's why, of all the functions performed and gaps filled by any business management software, the customer service application is perhaps most important for continued sales and overall customer satisfaction.

Maybe you already have an Enterprise Resource Planning (ERP) system, or maybe you're still hunting for one – either way, there are several things you should know about the functionality of a

modern, integrated software suite like Dynamics 365, starting with its customer service capabilities:

- » **Engagement:** Dynamics 365 for Customer Service goes far beyond traditional front office job duties like order taking, shipment expediting, and invoice processing. By focusing instead on the development of meaningful, lasting relationships between your company and theirs, you'll soon start to think of it as the Dynamics Team Building application.
- » **Integration:** If you have read the other parts of this book, you already know that Dynamics 365 is an integrated suite of software products, but this important point bears repeating – integration means seamless information transfer throughout the application. There's never duplicate or conflicting data, never a lack of visibility.
- » **Scalability:** Because Dynamics 365 is scalable (a techie term for 'grows with you'), it's suitable for all types and sizes of business. That's true whether your company has a dedicated service desk and fleet of customer service representatives, or one brave soul who manages the entire front office on their own.
- » **Service:** If your job duties include oversight of the corporate computers and network, you know all about service level agreements, or SLAs. They're an effective way to set expectations, allowing you to measure your suppliers against known values. Wouldn't it be a great sales tool if you could offer your customers the same thing? With Dynamics 365 for Customer Service, you can.

Sound familiar? Maybe so. The truth is that all software providers promise scalable, easy-to-use systems, and to be fair, the tools we as business users have available to us are far more capable than those of even a decade ago. Yet, as you'll see, Dynamics 365 has significantly raised the bar on business management software, everywhere.

That's because Microsoft is the world leader in information technology. From Azure cloud computing to the Office 365 product suite, not to mention Windows, Skype, Surface, SQL, Visual Studio, MSN, OneDrive, Internet Explorer . . . get the picture? Microsoft rocks.

Let's drive that point home. From a technology perspective, there's virtually nothing Microsoft can't handle, and that includes developing the most comprehensive business software suite available, one that gives you and others like you the ability to efficiently operate and grow your business.



Like many other software systems these days, Dynamics 365 runs in the cloud. You've probably heard of it, but what is the cloud, and why should you trust it to store your corporate information? Simply put, the cloud is nothing but a bunch of high-end, very expensive computers sitting in a hyper-networked, hyper-secure building, tended to by highly-trained IT professionals and guarded by the most advanced firewalls and antivirus software available.

Granted, that's a lot of highs and hypers, and while it might be possible that your corporate network is just as safe as Microsoft's cloud-based solutions, it's probably a good idea to evaluate the cloud and all that it can do for you before investing in your next business software system.

Making customer service effortless

One of the biggest differences between Dynamics 365 and 'the other guys' is its portability. This term isn't meant to describe software that can run on a Mac or Windows machine, a tablet or a smartphone (which Dynamics 365 does, incidentally) but rather its ability to be deployed via interactive email messaging, customer-facing portals and forums, or social channels such as LinkedIn or Facebook.

Suddenly, customers have the ability to self-service and not get mad about it. They can look up order status, or check the frequently asked questions section for up-to-the-minute information on your products or services. They can ask questions, share ideas with others, and easily get in touch with a representative if they run into problems.

Most important, while all this is going on, the system is getting smarter. Virtual agents quietly monitor customer activities, guiding visitors to a webinar for further training, for example, or alerting a human agent if it's time for some hand holding. And it's all done automatically, freeing you and your people to work on more value-added activities.

There's no more lost time reinventing the wheel because everything you and your employees do becomes part of the database, an ever-growing source of knowledge that makes everyone in the company more effective. Tribal knowledge? It's a thing of the past with Dynamics 365.



WARNING

All this talk of automation doesn't imply that you can fire half of the customer service team. Dynamics 365 for Customer Service is about improving relationships, not reducing headcount. It does mean, however, that while virtual agents work in the background to improve customer experiences, support people receive similar assistance. The result is that less-skilled workers can do more in less time, and customers are never frustrated by 'that new kid on the phone who doesn't know anything'.

Getting personal

This type of intelligent automation means customer experiences become more personalised over time. Because there's greater visibility to what your customers are doing, it creates additional opportunities for upselling. It stops minor hiccups from escalating into serious situations. Greater value is delivered each and every time your customer visits their customer portal, or a customer service agent helps them solve a problem.

Simply put, deploying Dynamics 365 for Customer Service helps develop customers who want to buy products and services from you because they know you 'get' them. When that happens, it creates a productive environment for everyone involved, one that leads to greater opportunities, greater satisfaction, and fewer problems. Does your current software do that?

Servicing in the Field

There's more to customer service than managing orders and making sure products ship on time. There's also service after the sale. Maybe you've heard of it. This more than anything is what keeps customers coming back, because they know you'll be there with them for the long haul.

But what's the big deal? If a customer has a warranty claim, sending someone onsite to fix it takes little more than a phone call and a trip across town. The same can be said for preventative maintenance

contracts, or any customer-facing service that requires support people in the field – these and other activities are easily managed with a whiteboard, mobile phones, and a van or two.



WARNING

Hold on though – what happens when the business grows (which it surely will if you’ve invested in the right software system)? Instead of keeping track of Nigel and Frank, now there’s Eliza, Rupert, and Liam to deal with. There are expenses to pay, parts to order, work orders and contracts to generate. Still planning to do all that on a whiteboard?

If you’ve never been there, managing a fleet of field service technicians is no easy task. And what better way to damage a flourishing customer relationship than to miss an appointment or be responsible for their equipment going down. The stakes are just too high to trust to anything but the best system available. Here’s a sampling of the tasks made much easier to manage with the Dynamics 365 for Field Service application.

Scheduling valuable resources

As mentioned earlier, whiteboards have long been the preferred (and only) scheduling tool for anyone involved in field service operations, but they quickly become unmanageable as workloads increase and headcounts grow. Worse, it’s only the people in the room where the whiteboard is hung who can see what’s coming down the pipe, making it difficult for sales and customer service people to . . . well, service their customers.

Dynamics 365 drag-and-drop scheduling eliminates that shortcoming. It lets dispatchers schedule jobs by map view, by employee skill level or location, by parts availability, or by priority (meaning which customer is griping the loudest). And because the schedule is available to anyone in the company (provided they have the proper access) the number of emails and phone calls needed to conduct business each day drops dramatically.

Keeping track of inventory

If your spare parts are currently tracked via clipboard or Excel, it’s time to get these valuable assets into an inventory management system. Reordering is easier, loss due to theft is virtually eliminated, and there’s never a need to say ‘Oops, I can’t find it’ and then have to reschedule with the customer. Has this ever happened to you?

Creating work orders

Chances are good your current work order system is paper-based and entirely manual. That's bad. There's little in the way of capacity planning or the ability to match the job to the most qualified person available. Wouldn't it be better to have a work order system that's fed by an available anywhere, online scheduling system as just described?

This last point is especially relevant in this age of smartphones and tablets. Because Dynamics 365 has robust 'available anywhere' capabilities, people in the field will never wonder what or where their next assignment is – unless someone's feeling lonely and wants to chat, there's never a need to call back to the office or track down the dispatcher. Just pop open the mobile app to find up-to-date job details, contact info, what parts are needed, and where to find the place. Easy.

Easy also extends to time management and customer billing. With Dynamics 365 for Field Service, personnel are able to clock in and out of jobs on their mobile devices. Billing therefore becomes more accurate and timelier, and timely billing means better cash flow.



TIP

Since Dynamics 365 for Field Service makes it easy to track the location of hardworking technicians – a technology known as *geomapping* – it also makes it easy for the folks in customer service to know when they walk out the door and what was the outcome of their visit. This would be an excellent time to make a courtesy call to check on the customer. They won't know what hit them.

Finally, greater efficiency means fewer people are needed to get the job done. Instead of eight service people, maybe six will do. This could reduce labour costs, true, but it could also give the department additional time for training, team building, collaboration with other departments, or more flexible working hours.

Best of all, an integrated, mobile system like this leads to first-time resolution rates that are off the charts. Customers will not only tell others about the great job you're doing, but they won't balk at the modest increase on next year's service-level agreement. Your efficiency, service level, and above all, attentiveness, will seem almost magical.

THE NEXT REVOLUTION

Perhaps you have one of those newfangled thermostats, the ones that know when you're away, know when you're coming home, and adjusts the temperature in your flat for you automatically. Similar technology exists for light bulbs, door locks, appliances . . . the list goes on. It's called the Internet of Things, and it's just one aspect of Industry 4.0, the next and perhaps most revolutionary of all industrial revolutions,

Industry 4.0 goes far beyond making our lives more comfortable. It also presents an unprecedented opportunity for improving machine and equipment uptime. By embedding sensors in everything from machine tools to office printers, manufacturers are making it possible to remotely monitor their wares. To those who sell and service such equipment, this offers the possibility of predictive maintenance, the next big thing in customer service.

How's that? Instead of waiting for the customer to call about the strange noise coming out of the machine you sold them last year, Industry 4.0-savvy businesses will instead be able to call the customer and tell them you'll be over next Tuesday to service their equipment. Parts can be ordered well in advance, expedite fees and overtime goes away, everyone's happy. Sound far-fetched? Not to Microsoft Dynamics 365 users – to them, it's just another day in the office.

Managing Projects Perfectly

Microsoft Corporation released the first version of its well-known planning tool – Microsoft Project – in 1990. As with most things from this global technology leader, it has continued to improve over time, and has since become the de facto software tool by which all others are measured. It's a great product, and perhaps you've used it to schedule your projects and available resources.

There's just one problem, and don't tell anyone at Microsoft that I said this, but Project can be complicated. If you're responsible for the Dover Western Docks Revival or the Gatwick Airport extension, it might be one of the many tools in your planning toolbox, but for most of us, there's a simpler way to manage company projects.

On time, on budget

Care to guess? An extension of Dynamics 365 for Customer Service, the Dynamics 365 for Project Service application helps even the most computer-challenged among us to:

- » Plan projects, create schedules, and determine workloads.
- » Estimate project costs and potential revenue.
- » Source and order materials and track their consumption.
- » Bill customers at any stage of the project.
- » Report progress to management and customers.
- » Analyse just what the heck is going on and what you are going to do about it.

Does project management sound like a lonely job? It doesn't have to be. Dynamics 365 Project Service is a collaborative application that team members can use as the home base for all of their project-related activities. For example:

- » Sales people will have a clear view of project cost and status at any time during its execution, giving them an effective tool for managing customer expectations.
- » Schedulers can use tools like auto-scheduling and load-levelling to keep people on track, and materials coming in at the right time.
- » The finance group will know whether the train is going to derail, long before it has an opportunity to do so. And because project billing is effortless, cash flow will be easier to manage.
- » Field technicians will arrive on time, at the right place, with the right tools and materials. No more wasted effort or chaps standing around trying to look busy.
- » As with the Field Service application, time and expenses are immediately captured and made visible from anywhere, at any time, to everyone.
- » Because every piece of the project is in one place and accessible to all team members, the islands of information so common with all projects are eliminated. Everyone is working from the same playbook.

Still want to use Microsoft Project? The good news is that Dynamics 365 for Project Service has a familiar look and feel, except that it's a far more collaborative, integrated tool than any standalone application.

What's more, the analysis tools available throughout Dynamics 365 are available here as well, providing insights you never thought possible (or easier to achieve). It might just have you wishing you went into project management years earlier.

A WELL-LAID PLAN

Anyone who's ever shopped for business software knows it can get expensive, which is one reason why Microsoft offers several different 'service plans' for its Dynamics 365 suite of cloud-based products.

Here's the good news: each Dynamics 365 application is available on an a la carte, per-user basis. No problem. If you want the full monty, however, that's fine too – just ask about the Dynamics 365 Plan (kind of obvious, right?), which includes everything. There's also the Unified Operations Plan, which includes Finance and Operations, and for those more focused on the customer service function discussed in this chapter (which is only logical, otherwise you wouldn't be reading this right now), there's the Customer Engagement Plan.

Again, feel free to pick whichever specific applications fit your needs, but if your company wants to improve its Customer Service, Project Service Automation, Field Service, and Social Engagement functions, this is the clear path to maximising your investment. Everything is bundled under one package, it all works together (with the rest of Dynamics 365), and it's a great way to save a few quid while making your Customer Service department the best it can be.

- » Taking a tour of Microsoft Azure
- » Looking at how to make great software even better with the AppSource
- » Understanding the Common Data Service
- » Using Dynamics 365 on tablets and smartphones

Chapter 6

Dynamic Considerations

Peel back the plaster in your house and you'll see a complex infrastructure of wood, metal, insulation, and hardware underneath, designed to keep you warm in winter, safe through the worst of storms, and let you draw a warm bath or watch BBC reruns on the telly whenever you feel the urge.

Peek beneath the covers of any business software and you'll see a similar infrastructure, although this one's built from dynamic link libraries (DLLs) and conditional logic expressions, chunks of code that only programmers understand but which – for business users, anyway – are just as important to your daily well-being as the roof over your head.

With luck, your software system's pipes aren't rusty and its wiring short-circuited. That's because, just like your house, business management software (BMS) needs routine maintenance to remain in tip-top shape. This means regular data cleansing, updates to the operating system and the software itself, and keeping computer hardware up to date.

Given enough time, however, even the most sturdily built home needs a little refurbishing. It's no different with business software. This chapter is like a walk down the new products aisle at your local DIY store, jam-packed with cool technology that might just leave you thinking about leaving your draughty old castle for an energy-efficient manor in the suburbs.



IT technology has made some pretty dramatic strides over the past decade. One of the most exciting of these is cloud-based software, which eliminates the need for frequent visits from carpenters and plumbers (IT staff and consultants) and indefinitely postpones the need to remodel the loo. Cloud technology also makes data more secure and mobile access much simpler to achieve.

Looking Skyward: Why Azure Should Be Everyone's Favourite Colour

If cloud providers were football teams, Microsoft would be Manchester City. A leader in cloud technology, the software giant continues to invest tens of billions annually in data centres across the world, and has developed a comprehensive suite of tools and technologies on which companies can grow their businesses.

Microsoft calls this cloud-computing platform Azure, and to those looking for a fast, cost-effective way to deploy software, install databases, or secure company information, it's the dog's bollocks. Here are just a few of the more than 600 services Microsoft Azure provides:

- » **Data management:** Azure offers various ways in which users can store and manage data. These include basic blob or table storage (videos, for example, or large, loosely structured data), as well as SQL platforms for application developers (like the chaps who wrote the software behind Dynamics 365, and the various third-party tools that connect to it). Most important to BMS users, Azure hosts Microsoft SQL server (MS SQL) databases. Why is that important? Because virtually all business software relies on a robust relational database in which to store information, and for Dynamics 365 installation, that database platform is MS SQL.
- » **Storage services:** If you've ever used Dropbox or stored pictures of your family vacation on sites like Flickr and SmugMug, then you've already used cloud-based file storage, a task that Azure performs admirably. So, aside from storing the data contained in the previously mentioned database platforms, Azure also provides secure, redundant storage of files and documents, whether you have a filing cabinet's worth or enough to fill a Range Rover. This allows companies to start with a small amount of storage and add

on as their needs grow (an attribute known as ‘scalability’), paying only for the storage they require.

- » **Virtual servers:** This is one of the coolest things about cloud-based software: you don’t need to buy an expensive server to use it. With Azure, there’s no more battery backups, tape storage systems, spare hard drives, fans, or power supplies (or equally expensive IT geeks to manage it all). And there’s never any worry over the office catching fire one night, erasing your company’s data assets in a puff of smoke. Just log on to a webpage or an app on your smartphone to access your virtual server (and the software residing on it) and get to work. Best of all, the virtual server is included with a subscription to Microsoft Dynamics 365. And as with storage, you pay only for as much server as you need.
- » **Software deployment:** Aside from hosting Microsoft Dynamics 365, Azure is home to hundreds of additional software applications, including Office 365. These tools and apps are tightly integrated to the finance, sales, and marketing functions within Dynamics 365, and are also accessible on a subscription basis. It’s a great way to expand your company’s capabilities without having to hire a software developer or pay an integration partner to reinvent the wheel.

Even if you’re only going to use a fraction of the services provided by Azure, it’s good to know the breadth and depth of Microsoft’s investment in cloud services. This isn’t some latest flash-in-the-pan computer fad. Azure, the cloud, and cloud-based services are here, and they’re here to stay.



TECHNICAL
STUFF

What exactly is data, and why should I care how it’s stored? Simply put, two types of data exist: static and transactional. Examples of static data include the addresses and phone numbers of your customers, bin locations in the warehouse, credit card numbers, and the birthdates of your employees (so you can remember to buy them a gift). Transactional data is created when an inventory adjustment is performed, or a payment made to a vendor. In most cases, these transactions cannot be changed (although they may be reversed) once committed to the system. Most static data can be modified (when a customer moves, for example, and you need to update the address), although some – a bin location is one – cannot be removed after it’s been tied to a transaction. This is one reason sound data management is a crucial activity in any business software system.

THE BOMBES OF BLETCHLEY PARK

If you've ever stared at the blue screen of death, knowing that you just lost two hours' worth of work because you forgot to press the save button, you might wonder who's responsible for the computer's invention and think about sending him or her a strongly worded email for having started the whole bloody mess. Sorry to tell you, but you'll have to wait until the afterlife to have a word with him.

English mathematician Alan Mathison Turing was the man considered to be most directly responsible for the invention of the computer. A fellow at King's College in Cambridge, his work on cryptanalysis during World War II led to the development of the Turing machine, also known as the Bombe, an electromechanical device that cryptologists at Bletchley Park would use to decipher German Enigma-generated secret messages.

Turing's invention almost certainly shortened the war, thereby saving millions of lives. Sadly, he never received the credit he deserved. So rather than cuss him out the next time your computer goes bonkers, you should probably just remember to save your work more frequently (or turn on your AutoSave!).

Shopping at the AppSource

Even if you don't much care for shopping, and hide out at the food court while your significant other tries on endless pairs of shoes and trousers, chances are excellent that you'll like Microsoft AppSource. What is it? For starters, it's not some silly site where you can download the latest version of Shazam, or install a fart noise generator on your smartphone in a hopeless effort to make the next management meeting more interesting.

No, the AppSource by Microsoft is a place where you can make great software even better. Need a way to send and sync data between Excel and Power BI, the business intelligence reporting tool connected to Microsoft Dynamics 365? There's an app for that. How about electronic signing of quotes or purchase orders generated from Word? Affirmative. Tools for improved document sharing with SharePoint, financial planning and forecasting, simplified scheduling of team meetings? . . . yes, yes, and yes. In fact,

more than 2,000 such tools are available in AppSource, including ones for these and other business functions:

- » Analytics
- » Finance
- » Human resources
- » Sales and marketing
- » Customer service
- » Operations and supply chain

Microsoft has designed well over 300 of these add-ons specifically for Dynamics 365, with another 150 or so available for use within Power BI. The remainder snap-in to Office 365 or complementary third-party applications. More such tools are being added every day. Many are available at no charge, while others might cost a few pounds a month, but only for the users that need them. And all of them are hosted on Azure.

Terminating Tiring Tasks

What good is a shiny new software system if you still need to perform the same old number crunching, report printing, month-end processing, and otherwise monotonous feeding of the software machine, day after day after day until your co-workers throw you a retirement party and you move to the South of France or the sandy beaches of Portugal? You wish.

Fortunately, there's a better way. Modern business management systems (BMSs) like Dynamics 365 offer a whiz-bang capability known in the software world as automation. As its name implies, automation automates things. Need to run the same set of reports every morning? Tell Dynamics 365 when to run them, what printer or email they should go to, and that's one less box to check on your daily to-do list.

Go with the Flow

Automation goes much farther than report generation. In Microsoft Dynamics 365 and Office 365 applications, users create multistep processes using a feature called Microsoft Flow. These processes

can even contain intelligent ‘if this, then go do that’ logic. This sort of decision-making capability is what separates the men from the boys in the brave new world of software automation.

For example, users might want to strip off email attachments and send them to a storage folder (one sitting in the cloud, of course). Big deal, you say. But what if you could strip those attachments by customer, file them in that customer’s folder, receive a push notification for the neediest of those customers, and automatically keep an Excel log of all correspondence? Pretty cool, huh?

How about:

- » Creating sales leads based on your company’s Twitter feed?
- » Automating customer support case creation based on manager approval, or open a related project in Basecamp or SharePoint?
- » Spreading the news over your latest big win to the entire sales team with Yammer?

Microsoft Flow takes care of all this and more, freeing you to go do more important work.



TIP

Just because Dynamics 365 lets everyone and their dog write their own reports and build their own nifty automation tools, that doesn’t mean you should allow it. Development activities like this – even simple ones – should be tightly controlled and documented. You need someone to keep track of who’s doing what at the company, not only to make sure people aren’t reinventing the wheel over and over again, but to help each other learn. So figure out which employee stays up late playing computer games each night, then make her responsible for managing company software customisations and add-ons. You’ll be glad you did.

Who needs coders?

Hold on, though. You already said that you’re not a programmer and you have no intention of becoming one. Doesn’t all this new-fangled automation require code-writing experience? Actually, no, and this is probably the best part about Microsoft Flow. The website contains hundreds of pre-built templates. Sign in with your Microsoft credentials, download whatever template you need

to the appropriate location, and get automating. Nor are these templates limited to Microsoft products. Flow integrates with YouTube, Zendesk, Pinterest, MailChimp, Facebook, and dozens more of your favourite apps.

Reducing Costs with the Common Data Service

Another Flow-enabled feature nestled comfortably inside Microsoft Dynamics 365 is the Common Data Service. What's that? Actually, it's one of the things that makes Flow possible in the first place. In *Star Trek* terms, the Common Data Service is like the universal translator that Captain Kirk used to negotiate with truculent Klingons, or make pillow talk with some alien, green-skinned beauty. Simply put, it's a database of 'standard business entities' (a fancy way of saying everyone agrees on what to call things in the software, and how they should talk to one another).

Dynamics 365 uses the Common Data Service as a standard from which to communicate with other Microsoft applications (like Office 365 and Power BI), as well as third-party tools residing on the Azure platform. It's also tightly integrated with PowerApps, a way to actually build custom fields and interfaces that work with the same data sitting inside your Dynamics 365 database.

If you're so inclined, you can even 'publish' these apps for use by others within the company. Say you want to do a little data collection in the shipping area on package weights, or decide your sales people should start capturing your customers' favourite sports teams for an upcoming marketing blitz. These possibilities and more exist thanks to PowerApps, the Common Data Service, and Dynamics 365.



TIP

You can use Flow, the Common Data Service, and PowerApps to build some brilliant apps, but one of the most exciting things made possible by these tools is a simpler (and less expensive) software implementation. There's no longer a need to hire expensive programmers and software consultants to customise your BMS software, or to write special apps that replicate legacy functionality.

Going Mobile: Dynamics 365 on the Move

Now that you're going barmy over the prospect of building your own apps, mentally adding up all the extra hours you'll save at the office that can now be spent holding down a stool at the local pub, let's take the timesaving possibilities a bit further. Let's take them on the road.

You have a smartphone, right? Do you ever think about using it for something besides checking your Facebook account? Thanks to the cloud, finance, sales and marketing systems have gone mobile, and most anything you can do at work (aside from making fun of your boss with your friends in the breakroom) can now be done on a smartphone or tablet.

This doesn't mean to say you will have even more free time to spend at the pub. No, mobility makes responses to customer inquiries more timely. It makes tracking down activity on important shipments a doddle. Collaborating with the engineering and operations won't require hours-long meetings in a conference room. And checking with human resources on your latest promotion? Easy.

Setting your own selfish interests aside for a moment, mobility is a game changer for companies, too. Consider the impact instant access to product data will have on field service efficiency. Same with the production floor, remote sales and support people, and project managers visiting customer facilities. Mobility makes everything easier.



The Active Directory (those acronym-loving IT people call it simply 'the AD') is like an electronic phonebook of all the computer users in your company. If you log on to the network in the morning (assuming your company has a Windows server platform) your logon credentials are checked against the AD, which not only stores your name, address, phone number, email address, and other important information, but also determines what files, folders, and computers you have access to. The AD is part traffic cop, part security manager, and because it already knows who's who on your network, is a great way to make software integration simpler and more secure.

- » Scoping out your requirements
- » Going live with your new software
- » Managing expectations
- » Looking at what comes next

Chapter 7

Getting Started with Microsoft Dynamics 365

Buying business software isn't like buying a new car – in most cases, it's far more difficult. For one thing, Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM) systems have way more than one or two drivers to keep happy, and most of them will be 'behind the wheel' of the company software system for hours each day, far longer than their daily commute. They need a comfortable ride. And whatever system you select, chances are you'll have it much longer (hopefully) than you would that Mini Cooper you've been eyeing the past few weeks. Better make it a good one.

Selecting the Right System

How do you go about choosing a top-notch system? After all, there are literally hundreds of packages out there, most of which claim to be the best thing since sliced bread. For those who've never done it before (and even for those of us who have), selecting and then implementing a business software solution can be more challenging than arguing politics with Theresa May.

As with many things in life, what you need is a good partner, someone who understands what to look for in a new system, how it will help your business, what's needed for a successful roll-out, and how to avoid some common mistakes. Thankfully, there are plenty of reputable software vendors that can do just that (although there are a few you ought to steer clear of). It's your job to ask around, find someone you think you can work with, and see what they have to offer. Perhaps most important, verify that your potential partner has the skills and experience you need to see you through the implementation and beyond.

Gather requirements

One of the biggest mistakes people make during any ERP and CRM implementation is not getting everyone in the company involved. Assuming you don't want to hear complaints from those people afterwards, this often starts by asking them what they need out of a software system. This means the boss lady in the corner office, the chaps shipping products in the warehouse, the sales and service team (because they're the ones facing customers every day), the finance and purchasing folks . . . everyone. You need to do it now, while you're still kicking the tyres. Here's a handy checklist of the things you should be working on at this stage of the project:

- » Who's going to be on the team? Although everyone in the company might be very interested in 'the new system', there should be a representative from each department able to speak about its unique requirements.
- » What are those requirements? This is a good time to drag the skeletons out of the closet – define and document processes, understand who does what (and why), and think about how things might work in a modern system.
- » Once you have the processes defined, it's time to imagine how they can be improved. Of course, you probably don't yet know the ins and outs of your ERP system, but this is an excellent opportunity to imagine new ideas and radical concepts.
- » Finally, develop a 'script' for how the product demonstrations should proceed. This puts everyone on a level playing field and helps to make sure you didn't miss any important functionality or forget to ask relevant questions.



Above all, remember this should be a fun process. Working with fellow team members as well as your technology partner should be collaborative in nature, not confrontational. If discussions get heated, which they sometimes do, take a deep breath and remember that everyone has the same goal: improvement of the business process, and greater success for all.

Use the car park

As you go through the software reviews, unexpected concerns and questions are bound to pop up. Left unchecked, these can quickly drag everyone into the weeds, leading to hours-long discussions and occasional fist-fights. Give everyone a few minutes to discuss these topics, and then record them in a ‘parking lot’ for future review with your software vendor (assuming they make it past the demo stage). The parking lot approach should also be carried through to the meetings you’ll soon be having with team members as you roll out your new Dynamics 365 system – save all those great ideas for later, and focus on what’s needed to get the system up and running.

Keep score

Develop a scorecard for each software package you’ll be reviewing, and then give a copy to everyone involved so they can rate the supplier and their wares. Some things to look for include a judgment call on how well the software meets each person’s needs, perceived integrity of the vendor’s sales and applications people, their software knowledge and ability to answer questions without fumbling, the participant’s comfort level with the software at the end of the demo, and so on. Each item should be rated 1 to 10, A to F, or whatever grading system works for you, just be sure that you can explain to upper management why you’ve decided to move forward with whatever system everyone finally agrees on.

Get references

Take this advice with a grain of salt. It’s a given that any references supplied to you by a software vendor will be handpicked examples of happy customers. Every business has their skeletons in the closet and it’s unlikely you’re going to hear about those. But that’s okay. Talk to vendor-supplied references anyway. Pick their brains about the implementation process, what other software packages they looked at, lessons learned through it all, and what they might have

done differently. Even the most successful ERP and CRM implementation has room for improvement, so it's important to learn all you can from those who have gone before you.

Toss out the old

Lastly, forget about your current system and 'that's the way we've always done it'. Making the new software look and act like your legacy software is a recipe for disaster, and even if you are successful, it will end up costing way more in money and effort than anyone bargained for. Now is a good time to keep an open mind, embrace new ideas, and prepare to move the company forward.

Ready, Set, Go!

Okay, you've all made a decision. The boss has signed the requisition, everyone's holding hands and singing Kumbaya, eagerly anticipating the installation and eventual Go Live of your new system. Now what? Well, it looks like you have some work ahead of you.

- » **Data migration:** Unless you're going to enter all of it by hand (which in small companies might be a possibility), all of the data currently residing in your legacy system must be 'migrated' to Microsoft Dynamics 365. The good news is that plenty of tools exist to do this, but this is also a great time to clean up data and correct past mistakes. Start by dumping everything out of the old system into Excel (again, there are tools for this), and start cleaning. After a little sorting, filtering, and normalising the data, all addresses and phone numbers will use the same format, old part numbers will be history, the general ledger will at last be perfect, and you'll never have to stumble across the name of that weirdo you hired five years ago to empty waste bins and clean the loo.
- » **RICEF:** Uh, oh. Another acronym. This one's a biggie, and stands for *reports, interfaces, conversions, enhancements, and forms*. Classic ERP vendors love RICEF, because it gives them an opportunity to invoice hundreds of consulting and programming hours to develop RICEF that you probably don't need. Thanks to the Common Data Service (discussed in Chapter 6), most of the RICEF work has been eliminated

from Dynamics 365. However, there will likely be some reports and dashboards that you might want some help with. Now's the time to get them defined, built, and tested.

» **Training:** Microsoft Dynamics 365 is easy to use, but you still need to get everyone trained. Some companies go so far as to build their own custom training material, specific to their daily tasks and procedures. Unless your company has a room full of training people sitting around waiting for something to do, full-blown process documentation is probably overkill. A far more cost-effective approach is to leverage the built-in, context-sensitive help menus in Dynamics 365, along with Microsoft and Internet-based resources and whatever training material your software vendor is able to provide. Whatever else you do, don't leave it to your users to self-train. Set up a schedule, walk them through the software, and have them perform transactions in your own training system. There's no worse time to discover that your users slacked off on their software training than the day they actually start using the software.

» **Go Live:** The big day is here. Better make sure there are plenty of pastries and coffee in the morning, some tasty sandwiches for lunch, and bangers and mash for dinner (hopefully accompanied by a pint or two to celebrate). But first, they'll have to make sure all their data is where they expect it (because the IT people moved it to the new system on Friday night), that they can process reports and perform their daily activities without any problems, and that everything is hunky-dory for Monday morning. And while all this might sound scary, it's mostly a fun time, one that signals closure for weeks of effort and the beginning of a new company era. It's also a great way to get the boss to buy lunch for everyone, which in many companies is even harder than convincing him or her to give you a raise.



WARNING

Who needs CRM? That's a little like asking who needs customers. New Yorker Arnold Neustadter invented the Rolodex more than 60 years ago, and people have been attempting to improve their grip on customer information ever since. The culmination of these efforts is customer relationship management software, or Dynamics 365 for Sales. It's like a Rolodex on steroids, not only providing instant access to customer contact information but also what they're buying and why, comments from customer service

and marketing people, sales targets and pipeline health, as well as the good, bad, and ugly on past orders and payments. If you're still using that old Rolodex, your customer relations are living on borrowed time. Get with the program, mate.

Managing Expectations

Your company's gone live. Everyone's happy with the new system, products and invoices are going out, services are being performed, money's coming in to the bank. What else did you expect?

That's a good question. We discussed in Chapter 1 the need for metrics by which businesses can measure themselves. Time to get measuring. Chances are excellent that you'll be pleasantly surprised with the faster inventory turns, the shortened quote to cash cycle, and the streamlined collaboration between you, your teammates, and your customers alike.

If not, it's time to figure out why. Analyse your key indicators. See what screw needs tightening or what person needs some additional help (or perhaps a kick in the backside). No matter how great the software system or how well-trained the team members who implemented it, Murphy's law is just as applicable here – perhaps more so – as it is everywhere else.

Deciding Who's in Charge

Hopefully everyone figured this out a long time ago. It's you, right? Maybe, maybe not. If you've been the Dynamics 365 implementation champion for the past weeks or months, you might be ready for a break. If so, you need to find a replacement: someone who understands the software and the company's needs at least as well as the backs of their hands.

In all fairness, however, pinning this responsibility on the back of one superhuman is (has been) asking for trouble. People get sick, they leave for greener pastures, they retire. If the keys to your company's software kingdom rest in one person's hands

(no matter how capable that person might be), then everyone is at risk.



TIP

That's why any successful business software implementation has important people called Power Users. These are the folks everyone goes to when they're stuck posting a general ledger transaction, or can't figure out how to apply a shipping charge. Power Users are the ones who build dashboards using Microsoft Power BI (even though this tool is easy enough for even the boss to use). They're the ones who download, test, and rollout the latest apps from Microsoft AppSource. And they're the ones who keep the lines of communication open between team members and department heads.

This is an important point. Success with any system is all about teamwork and communication, something that's especially true with Microsoft Dynamics 365, which thanks to the cloud and its massive mobility potential promotes collaboration both within and without the company walls. It's also one of the reasons why you chose the software in the first place. Now use it.



TIP

Scope creep is the result of not clearly defining and managing expectations at the beginning of a business management software (BMS) implementation. It's a little like spending the whole evening at an all-you-can-eat buffet; you'll probably get a stomach ache and will be late getting home; but in the case of software systems, you'll almost certainly go over budget as well. Keep a firm handle on user requests and put everything outside of scope in the parking lot. You'll have plenty of time for these requests later.

Taking the Road to Continuous Improvement

Okay, now what? Just because a few months have passed since Go Live doesn't mean you should be resting on your laurels. Implementing Dynamics 365 software is the ultimate continuous improvement project for any company, and requires ongoing effort if you're going to take full advantage of it.

For example, if you never got the hang of SQL Server Reporting Services, now's a good time to dive in with Power BI. Can't figure it out on your own? No worries, there's plenty of information on the Microsoft website (as well as a *For Dummies* book on the subject) and your implementation partner almost certainly has people who can lend you a hand.

The same is true for the many advanced tools available in AppSource. This post-implementation period is also a good time to circle back with all the end users, to see whether a little refresher training is in order. Make sure everyone continues to follow the data hygiene rules established prior to Go Live. And, above all, enjoy your new software. Unlike many ERP and CRM software systems, Dynamics 365 is fun to use.

IN THIS CHAPTER

- » Determining if your team is ready for Microsoft Dynamics 365
- » Engaging the entire team
- » Leveraging your tools and assets
- » Looking at additional integration opportunities
- » Preparing for company growth

Chapter 8

Ten Dynamic Ways to Improve Business Operations

A good Business Management System is like a balanced diet. You might not always like the vegetables, but it's sure to keep you strong and healthy for a long time to come. Yet there's far more to successful business operations than the peas and carrots of a software system. Does the company have a strategy for winning new business? Are the employees happy and working together as a team? Are you meeting company performance indicators? Do documented procedures and training plans exist, so that everyone knows his or her responsibilities and new employees aren't left to drown? Without most of these in place, it's unlikely a new software system is going to provide the benefits one would hope for.

Even when everything's running brilliantly, however, there's a right time for every endeavour, whether it's getting married, having a child, or ordering a Chinese take away. Software is no different. If everyone's knackered from too much work and too little time off, then no amount of software technology is going to

improve that (and will likely just make things worse). If sales are down the pan, and your customers are whingeing about price and delivery, you'd best get that house in order first. If vendor relations are shambolic, the employees are threatening to strike, or the engineering and marketing teams are in the middle of a major product rollout, hold off on any software initiatives until that dust has settled.

Too many companies purchase software as a cure-all, thinking that it's going to repair ailing sales or improve employee productivity. Not so. If the underlying business practices are unhealthy, implementing software will be like tearing off a years-old bandage, in all likelihood revealing diseased tissue underneath.

Maybe this sort of trial by fire is okay; just make certain everyone knows what to expect. But in most cases, business management software is best applied in a relatively stable organisation, one equipped to handle and even embrace the exciting changes brought about by new technology. Here are ten things to think about as you contemplate a move to Microsoft Dynamics 365.

Engaging the Team

One of the biggest mistakes companies make when implementing business software is failing to get everyone engaged in the project. We touched on this subject in Chapter 7, but it bears repeating: if your Dynamics 365 software implementation is a pet project that belongs to only a small group of people charged with deciding on their own what's best for the company (even though they may be right), the project is sure to fail.

Let's start with the boss. Upper management must be a firm believer in the importance of a new system. They must provide time for all of the company's key employees to be involved, not only the ones directly involved in the project.

And for those responsible for its success, it's a fair assumption they're going to need help from others with their regular job while they're busy with the rollout. Are these people available?

Upper management must also have the will to keep pushing the team to success. Too many implementations have achieved

lacklustre results or even failed altogether because the boss and her direct reports failed to lead the charge.



REMEMBER

It's a big commitment all around, but don't let that scare you. This is a great opportunity to take apart the corporate watch, to analyse why people do what they do each day and uncover hidden inefficiencies. It's only by understanding these potential areas of improvement that they can be fixed. New software may help in some of these cases, while in others the solution is more procedural. Either way, all this 'moving of the cheese' is a healthy activity. It's time for everyone to take a big bite.

Asking Questions

Our mothers have always told us that there's no such thing as a dumb question. While Mum may have never participated in a Dynamics 365 implementation, the old gal means well, and her intent is noble. People young and old alike should be encouraged to ask, ask, and keep asking. It's the only way they're going to learn. This is especially true in the face of a new software system.

That's not to say that Dynamics 365 Business Central and Customer Engagement users should sit around barking out questions all day. Encourage them to check the online help, or search the Internet and the Microsoft website for answers. And don't forget to check the online forums – with well over 100,000 Microsoft Dynamics 365 users on planet Earth alone, chances are good someone else has asked the same question before.

Keeping It Clean

So you just bought a new flat in the city. You're awfully proud of it. You'll want to hang some wallpaper in the bathroom and lay down a few rugs before showing it to your friends. Maybe it's time for a new couch? Above all, you're going to keep the place clean, dusting the countertops and sweeping up the occasional mess. Right?

Why should your new software system be any different? Maintaining data integrity is one of the most important activities in any business management software (BMS). Without it, transactions

become more difficult to find and reports more difficult to write. For example, you might know that ‘Jon Smith’ and ‘John Smith’ and ‘Jonathon W. Smith’ are all the same person, but your software doesn’t. So when your manager wants to know how many backgammon games John Smith purchased last year, how are you going to figure it out when the sales records are spread across three different customers and hundreds or even thousands of transactions?



TIP

One way to avoid all this is to decide on a naming convention for new customer records up front, well before Go Live. You might want to limit who can enter these and other bits of static information, at least temporarily, until everyone has a firm grip on the rules and regulations of data entry. At the very least, you’ll want a clearly defined playbook on how data should look, test it thoroughly in your Dynamics 365 sandbox, and then train the heck out of anyone with access to your system.



REMEMBER

Business Management Systems are built on databases. Once Go Live is complete, the database that was used for employee training is often referred to as ‘the sandbox’, as it gives everyone a place to ‘play’ with the software. (And who doesn’t like to play in the sand?) It’s important to always keep a relatively current sandbox available, to test new apps, improve procedures, and verify ‘what if’ scenarios. This task is easily accomplished by taking a snapshot of the production system and copying it into a new sandbox, or by overwriting the old one.

Keeping an Open Mind

Whether you’re attending a bold new theatre production or tasting a novel menu item at the local pub, keeping an open mind is important (and it’s especially important when arguing with your spouse about your fourteen-year-old daughter’s new Facebook page). Now that you’re staring at a new Dynamics 365 screen, it’s time to toss out those tried-and-true business processes and dearly held preconceptions in favour of improved ways of doing things.

Using the Tools

Many companies fail to utilise their business software to its full-est capability. The employees are busy, there's no push from management to expand into uncharted technology waters, and no curious Power Users exist to see what happens when a certain button is pushed. And that's okay – just because a car can hit 250 mph on the M6 Toll doesn't mean you want to go that fast, or even should.

But whether or not you enjoy all the benefits of a modern BMS, systems like Microsoft Dynamics 365 make work easier and provide users with better ways of performing everyday tasks. For example:

- » Can't seem to find the invoice you know was sent out last week? The Dynamics 365 'relevance search' tool leverages Microsoft Azure to find whatever bit of data you might have misplaced, anytime, anywhere.
- » Did you know that Microsoft acquired LinkedIn in June 2016? Because of that decision, you can now access important contact information directly from within Dynamics 365. Thanks, Satya.
- » The Relationship Insights assistant analyses email and social media interactions and provides intelligent reminders, calendar appointments, and more. You'll never forget another meeting with your manager, ever (unless you want to, of course).
- » Don't like the way your open purchase orders are displayed? The editable grids in Dynamics 365 make it easy to reorder columns, add or hide fields, and sort and filter in whatever order you like, and then save that layout under your user ID.
- » Tired of endless phone calls from customers checking on delivery, or having to enter pricing information for the big RFQ package you sent out last month? With customisable self-service portals, it's easy to get your customers, suppliers, and employees out of your hair for good.

There are plenty of other tools to choose from, with new ones being developed all the time. Don't worry about using all of them

at once, but do keep moving forward. And who knows, after a while you might be developing and publishing your own apps, reports, dashboards, and BI tools. Time for a pay rise!

Asking Your Customers

Now that your company has successfully completed its Microsoft Dynamics 365 implementation, it's okay to give one another high fives in the hallway and buy each other pasties at the weekend football match. But you'd best stop for a minute and ask: what do our customers and suppliers think of the new system? They may not be sitting in front of it every day, but they might very well be feeling its effects, good or bad. Are they receiving their products on time? Any challenges with placing orders, or making payments? Even if everything is brilliant, it's a good idea to let them know about your new system (so they understand the progressive nature of the company) and invite them to make whatever suggestions or complaints they may have.



REMEMBER

And let's not forget about the many doors to collaboration your efforts with Dynamics 365 have opened. Colleagues can communicate via chat, email, or Skype without stepping one foot outside the software. Files can be shared to the cloud and worked on as a team. Twitter feeds and Facebook posts can be acted upon, tasks can be delegated, and field service and remote employees brought back into the virtual fold. And best of all, many of these capabilities can be shared with customers and vendors as well. It's time to invite them to the party.

Preparing for Growth

What did you do all this for if you didn't expect to grow? Are you ready for it? Do you have the right employees in place, and will your suppliers be able to keep up with the demand? The good news is that the Power BI tools connected to Dynamics 365 will help you analyse past history, open orders, and market projections, apply a little human intuition, and predict your sales for next five weeks or five years. The same holds true for other important business trends you or your management team might be concerned with. Power BI gives everyone the clairvoyance they never before thought possible.

Keeping It Under One Roof

If your company's been stuck for years with busted business software, chances are you'll be glad to put a mark in the 'Dynamics 365 implemented' checkbox and get back to work. But wait! What about all the other software your company uses? Go ahead and catch your breath, but then take a look at the additional integration opportunities you now have. Microsoft and its partners provide interfaces to many popular CAD systems, warehouse automation tools, e-commerce platforms, and hundreds of other third-party products, many of which you may already be using. No more duplicate data entry, no more islands of information, no more wondering what they're doing on the other side of the wall.

Empowering the People

There once was an upstart British colony whose disloyal subjects decided to dump all of His Majesty King George III's tea into Boston Harbour. You know the rest. Whatever your thoughts about that infamous day, those rebellious lads and lasses went on to write an important document that began with the words, 'We the People'. Centuries later, those words apply just as well to business management as they do to country founding.

That's because the most successful companies empower their employees. They show them where they're going to sit, train them how to do their jobs, and then they set them loose. You decide how to handle the unhappy customer situation, Margaret. Figure out the surcharges on your own, Joseph, and let me know how it worked out. These and countless other examples of trust are what make good companies great. Empowerment frees employees to make their own mistakes and learn from them. They'll become more efficient, self-sufficient, harder working, and satisfied with their jobs. And they're more likely to stick around a long time.



TIP

Use well-defined milestones during your implementation project to keep everyone aware of the team's progress (or lack thereof). Examples include completion of process walkthroughs, departmental pilot, initial data migration, procedure testing, and so on. Check with your software vendor for a starting template.

Success Is More than Software

We've been tooting the Microsoft Dynamics 365 horn for the last 70 pages or so. It's a great product and we're proud to be part of it. We think you'll feel the same way. But we also recognise that software is just a tool. It's a bus meant to take its passengers to new and better places. Now it's up to you and your team to drive it. Enjoy the ride, and if you need directions along the way, give the nice chaps at GCC a call. They're not only friendly, but they know everything about Dynamics 365 needed to get you up and running quickly.

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